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Enterprise Rent-A-Car

ARMS/Web 3.0 Functional Design Specification Authorize a Request

Version 1.1

Last Saved: 9/26/00 10:50 AM

Revision History

Date	Issue	Description	Author
April 13, 2000	0.1	Updated with Database Fields	Cindy Bastean, Deb Ealick
April 20, 2000	0.2	Removed subdocuments	Cindy Bastean
May 10, 2000	0.3	Modified according to cross-team review	Cindy Bastean
May 15, 2000	0.3	Added screen change to document according to cross-team review	Debi Ealick
June 8, 2000	0.4	Updates for Iteration 2	Brian Weingart
June 8, 2000	0.4	Added data field information	Cindy Bastean
June 14, 2000	0.4	Added Zefer look and feel image for the Authorize Rental Detail	Amanda Banta
July 3, 2000	0.5	Changed Screen information	Cindy Bastean
July 13, 2000	0.5	Updated Use Case and Screen Design Sections	Brian Weingart, Mike Slater, Johnny Sands, Deb Ealick, Brent Armbruster and Cindy Bastean
August 24, 2000	1.0	Updated Use Case. Changes made based on feedback provided by management reviewers.	Mike Slater
September 26, 2000	1.1	Changes made based on feedback provided by business leads with respect to the future state of Release 3.0.	Amanda Banta, Aaron Foster, Mike Slater, Tim Weinstock

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Authorize a Request

1. Authorize Request Use Case

1.1 Application Overview

The following is a document used to illustrate the process for how a USER authorizes a direct bill request using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes how a USER authorizes a direct bill request.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to authorize a direct bill request. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the USER would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to confirm the direct bill request.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 Pre-Conditions

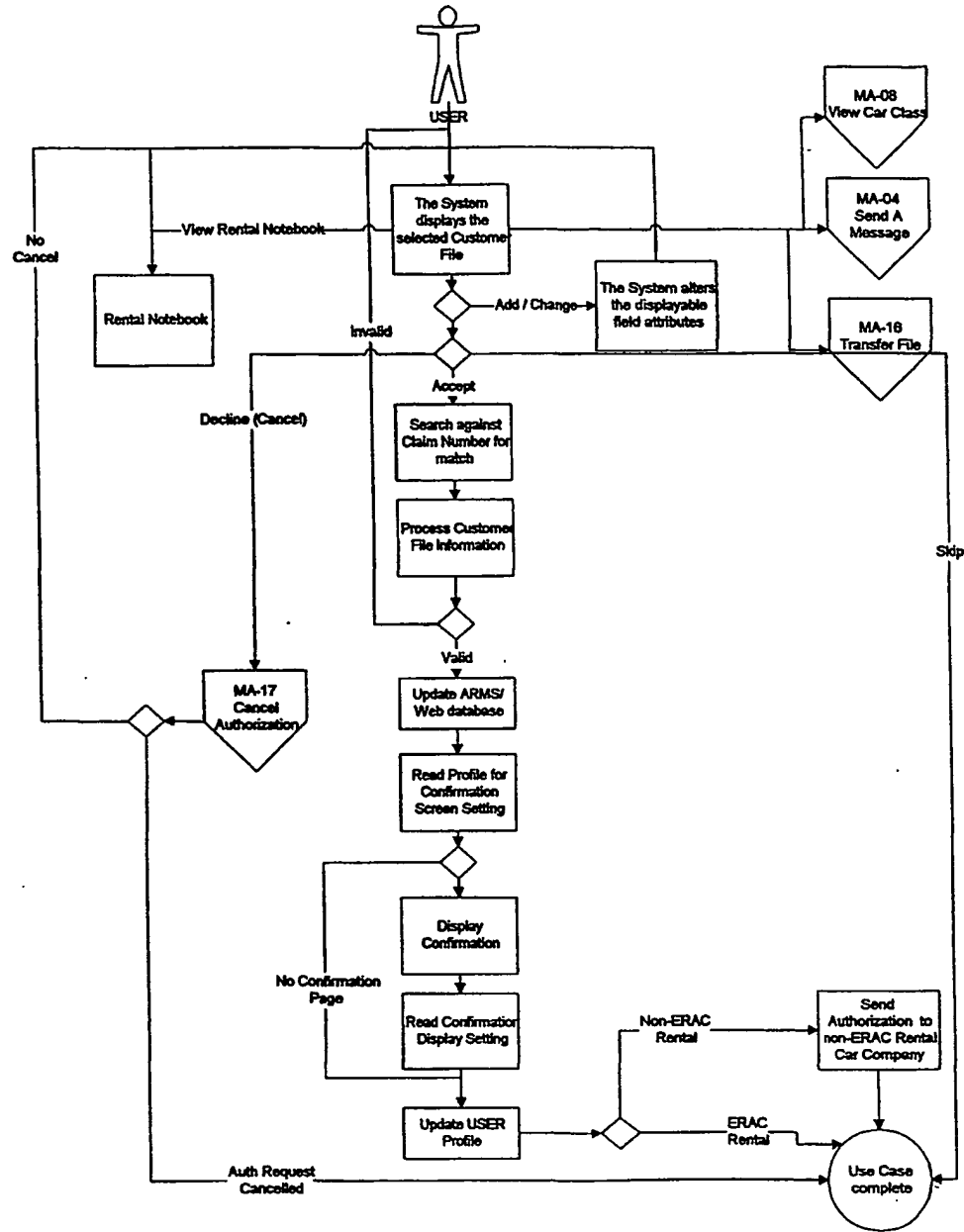
- The USER must be logged into the ARMS/Web system.
- The USER must have the authority to authorize a request.
- At least one outstanding unauthorized direct bill request must be assigned that the USER may handle.
- The USER must have selected an Unauthorized Direct Bill Request from the Review Action Items Screen or from the Search Results page.

1.5 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to "Authorize Request"

1.5.1 Activity Diagram

Authorize A Request Activity Diagram



1.5.2 Basic Flow

1. The USER selects an outstanding direct bill to authorize.
2. The system displays the Customer file.
3. The USER reviews the renter's information.
4. The USER inputs a number of Authorized Amounts, days and required fields.
5. The USER submits the Authorization.
6. The system validates information in the Customer File.
7. If the USER assigned to the Customer File is 'UNKNOWN' or 'UNASSIGNED', the System will assign the Customer File to the current USER.
8. The system will update the ARMS/Web database with the Authorization.
9. The System reads the USER profile to see if the confirmation page should display.
10. If the profile indicates 'Show Confirmation Page', the System will display the confirmation page
11. For non-Enterprise rentals, the authorization request is sent to the non-ERAC rental car company's rental system.
12. This ends the use case.

1.5.3 Alternative Flows

1.5.3.1 View Notebook

At step 3 of the Basic Flow, the USER can select to view the transaction history (Notebook) by selecting the Go To Notebook link.

1.5.3.2 Add Notes to Customer File

At step 3 of the Basic Flow, the USER can add notes to the Customer File by typing in the appropriate notes field on the Customer File page.

1.5.3.3 Skip Customer File

At step 3 of the Basic Flow, the USER can get out of the Customer File by selecting the skip button on the Customer File page.

1.5.3.4 Change Customer File

At step 3 of the Basic Flow, the USER can make changes to the additional details of the Customer File. This is done by selecting the Add / Change link which will invoke an editable page with all *appropriate information editable.

1.6 Post-Conditions

- If the use case was successful then the changes should go into effect immediately and the screen should revert back to the original screen of entry.
- If the use case was successful, then the ARMS/Web system will be notified of authorization changes.
- If the use case was unsuccessful then the system state will be unchanged.

1.7 Special Requirements

1.7.1 Requirements for Claim Type Authorizations (Insurance Users Only)

The following are a set of requirements surrounding the type of authorized amounts that are allowable based on the Claim Type associated with a rental. These restrictions **DO NOT APPLY** to reservations that are submitted with a Direct Billing Percentage of zero (0).

1.7.1.1 When the Claim Type selected is 'Insured', 'Theft', or 'Uninsured Motorist'

1.7.1.1.1 For insurance USERS, the reservation/rental must always include an Authorized Rate or both Policy Daily and Maximum Limits as defined by the renter's insurance policy. Zero (0) is an acceptable Policy Daily Limit.

1.7.1.1.2 For insurance USERS, the reservation/rental must include an Authorized Rate

or Policy Daily Limit if a Policy Maximum Limit is included. Zero (0) is an acceptable Policy Daily Limit.

1.7.1.2 When the Claim Type selected is 'Claimant' (Insurance Users Only)

1.7.1.2.1 The reservation/rental must always include an Authorized Rate.

1.7.1.2.2 The reservation/rental may not include a Policy Daily/Maximum Limits selection.

1.7.1.3 Requirements for editable fields based on reservation / ticket status

1.7.1.3.1 Depending on the status of the Customer File the USER may change the following fields:

Field Name (Depending on USER Segment)	Unassigned/ Unauthorized Reservation/Ticket	Assigned but Unauthorized Reservation or Ticket	Authorized Ticket
CLAIM NUMBER (Insurance & Fleet) PURCHASE ORDER NUMBER (Dealership) CORPORATE CLASS NUMBER (Corporate)	X	X	X
CLAIM TYPE (Insurance) BILL TYPE (Dealership)	X	X	X
VEHICLE CONDITION	X	X	X
DATE OF LOSS (Removed for corporate)	X	X	X
INSURED INFORMATION	X	X	X
RENTER INFORMATION	X		
DATE RENTAL IS NEEDED	X		
NUMBER OF AUTHORIZED DAYS	X	X	
DIRECT BILL PERCENT (Insurance Only)	X	X	X
POLICY LIMITS (Insurance and Corporate Only)	X	X	X
AUTHORIZED RATE	X	X	X

If the Customer File is an Unauthorized Reservation, the USER can Reject the Authorization Request, Send a Message, and/or Transfer (Assign) the file to a USER.

1.7.1.3.2 If the status of the Customer File is an open ticket the following rules apply:

Actions	Authorized Reservation	Unauthorized Reservation / Ticket	Authorized Open Ticket
Send Message	X	X	X
Extension			X
Terminate Rental			X
Cancel Authorization	X	X	
Transfer/Assign Adjuster	X	X	X
View Car Class	X	X	X

1.8 Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.8.1 MA-04 Send A Message

The Send Message will be used to allow the USER to capture messages and diary notes associated with extending a rental. The USER can elect to either have the message sent to the rental company responsible for the reservation/authorization, or (Depending on the USER segment if this option is available) to store the note in the ARMS/Web system without sending the message to rental company. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.8.2 MA-07 Additional Charges

The USER may choose to select the additional charges button that displays a page showing all the additional items at the branch with the branch charges displayed. The USER can select the items and enter in the authorized amounts.

1.8.3 MA-16 Transfer Work

The USER may choose to transfer an authorization to a different USER in his/her office or transfer the authorization to another USER in a different office.

1.8.4 MA-08 View Car Class

The USER may choose to view the car class. This button invokes the View Car Class use case.

1.8.5 MA-17 Cancel Authorization

The USER may choose to deny the authorization. When the USER selects the CANCEL button, it will invoke the Cancel Authorization use case to reject the authorization.

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

This screen will allow the USER to work the currently selected authorization request. The USER (Depending on the USER segment) may set the authorization amounts and policy coverage limits or may assign the request to another USER.

(ARMS/Web 2.0)

Automated Rental Management System	
<div style="border: 1px solid black; padding: 2px; display: inline-block;"> CRUISE & RESERVATION </div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 10px;"> RENTAL CUSTOMER </div>	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> CLAIMS OFFICE </div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 10px;"> YOU ARE HANDLING FOR: YOURSELF </div>
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Authorize Direct Bill: for Hanks, Tom Claim no. 765849322-001 CUSTOMER FILE </div> <div style="text-align: right;"> 1 of 4 Action Items </div> </div>	
<div style="border: 1px solid black; padding: 5px;"> Direct Bill Information for: <div style="display: flex; justify-content: space-between;"> Company: 21 55 N Phone: 773 334 5400 </div> <div style="display: flex; justify-content: space-between;"> Address: 1735 N. Pauline St. City: CHICAGO, IL 60622 </div> </div>	<div style="border: 1px solid black; padding: 5px; height: 100px;"> Notes & Email from: </div>
<div style="border: 1px solid black; padding: 5px;"> Claim Information: 765849322-001 Claim Type: Select a Claim Type Loss Type: Select a Loss Type Date of Loss: MM / DD / YY Loss Location: MM / DD / YY Vehicle Model: Year / Make / Model </div>	<div style="border: 1px solid black; padding: 5px; height: 100px;"> Notes & Email from: </div>
Submitted Date: 03/28/2000 Time: 12:34 PM	
<div style="display: flex; justify-content: space-around;"> Print Cancel Submit </div>	
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> [Change or Add] </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> RENTAL INFORMATION: Hanks, Tom 1735 N. Pauline St. Chicago, IL 60622 </div> <div style="width: 45%;"> Home: 773/334-5054 Work: 773/335-6000 Email: thanks@z.net Requested email confirmation </div> </div> <div style="margin-top: 10px;"> RENTAL INFORMATION: Enterprise Rent-A-Car Location: Enterprise Edgewater Branch 5400 N. Ashland Chicago, IL 60622 773-334-5400 </div> <div style="margin-top: 10px;"> ADDITIONAL CLAIM INFORMATION: Insured Name: Lakumander, Craig Owner's vehicle: GMC Suburban 1999 Date of Loss: 03/28/2000 Type of Loss: Non-Driveable </div> <div style="margin-top: 10px;"> Repair Facility: Elco Chevrolet 22, Elston Dr. Chicago, IL 60621 773/334-9832 </div>	
NOTES: Direct Bill request for Hanks, Tom 4/23/00	
<div style="display: flex; justify-content: space-around;"> Top of page </div>	

(Insurance User)

Welcome to the
Automated Rental Management System

creates a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

Authorize Direct Bill: for Hanks, Tom Claim no. 765849322-001
CUSTOMER FILE

1 of 4 Action Items

Direct Bill Requested for: Claim Number: 765849322-001 Claim Type: Select a Claim Type

Days to: Compact/21.95 \$ Monthly Rental Company

Rate: Daily Rate 20/500 \$

Maximum: 100 \$

Vehicle Condition: Select a Condition

Date of Lease: January 1 2000

Date Rental Needed: January 1 2000

Insured Name: Last: First:

Message: Direct Bill request for Hanks, Tom 4/23/00

Go to Notebook

[Change or Add]**RENTER INFORMATION:**

Hanks, Tom
1735 N. Paulina St.
Chicago, IL 60622

Home: (773)564-6054
Work: (773)395-6200
Email: thanks@zefer.com
Requested email confirmation

RENTAL INFORMATION:

Rental Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

NOTEBOOK:

Direct Bill request for Hanks, Tom 4/23/00

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(Fleet User)

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Office: 001 Handling for: Yourself

Authorize Direct Bill: for Hanks, Tom Claim no. 765849322-001
CUSTOMER FILE

1 of 4 Action Items

Direct Bill Requested for: Claim Number: 765849322-001 Claim Type: Select a Claim Type

Days: Compact/21.95 Policy: 20/500

Note to Rental Company:

Protection Coverage:

Date of Hire: January 1 2000 Date Rental Needed: January 1 2000

Insured Name: Last: First:

Message: Direct Bill request for Hanks, Tom 4/23/00

Go to Notebook

[Change or Add]**RENTER INFORMATION:**

Hanks, Tom
1735 N. Paulina St.
Chicago, IL 60622

Home: (773)564-6054
Work: (773)395-6200
Email: thanks@zefer.com
Requested email confirmation

RENTAL INFORMATION:

Rental Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

NOTEBOOK:

Direct Bill request for Hanks, Tom 4/23/00

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(Dealership User)



Office: 001

Handling for: Yourself

Authorize Direct Bill: for Hanks, Tom Purchase Order No. 765849322-001
CUSTOMER FILE

1 of 4 Action Items

Direct Bill Requested for:		Purchase Order No: 765849322-001		Bill Type: []	
Days: []		Compact/21.95 []		Vehicle Class: []	
Note to Rental Company:					
[]					
Date of Lease:		January []		1 [] 2000 []	
Date Rental Expires:		January []		1 [] 2000 []	
Insured Name:		Last []		First []	
Message: Direct Bill request for Hanks, Tom 4/23/00					
Go to Notebook: []					

[Change or Add]

RENTER INFORMATION:

Hanks, Tom
1735 N. Paulina St.
Chicago, IL 60622

Home: (773)564-6054
Work: (773)395-6200
Email: thanks@zefer.com
Requested email confirmation

RENTAL INFORMATION:

Rental Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

NOTEBOOK:

Direct Bill request for Hanks, Tom 4/23/00

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(Corporate User)

Welcome to the
Automated Rental Management System

CREATE A RESERVATION find a CUSTOMER

Office: 001 Handling for: Yourself

Authorize Direct Bill: for Hanks, Tom Corporate Class No. 765849322-001
CUSTOMER FILE

1 of 4 Action Items

Direct Bill Requested for: Corporate Class No. 765849322-001

Days: Compact/21.95

Note to Rental Company:

Date Rental Needed: January 1 2000

Message: Direct Bill request for Hanks, Tom 4/23/00

Go to Notebook

[Change or Add]

RENTER INFORMATION:

Hanks, Tom
1735 N. Paulina St.
Chicago, IL 60622

Home: (773)564-6054
Work: (773)395-6200
Email: thanks@zefer.com
Requested email confirmation

RENTAL INFORMATION:

Rental Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

NOTEBOOK:

Direct Bill request for Hanks, Tom 4/23/00

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ARMS Redesign Project – Release 3.0
 Authorize a Request

Issue: v1.1
 Issue Date: 10/20/00

2.1.2 Authorize Rental Detail

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling For:	List Box	30	Handling for USER's Name	First Name + Last Nmae	
Note to :	Input	0	Message	NOTE	
Notebook	Output	50	Message	NOTE	
	Output	8	Message Creation Date	Add Date	
Message	Output	50	Message Text	NOTE	
	Output	10	Notebook creation date	Add Date	
Claim no Corporate Class no Purchase Order no	Output	30	Claim Number Corporate Class Number Purchase Order Number	Insurance Claim Number	<ul style="list-style-type: none"> Claim number is for an insurance USER Corporate Class number is for a corporate USER Purchase order number is for a dealership USER
- Claim Number: - Corporate Class Number - Purchase Order Number	Input	11	Claim Number Corporate Class Number Purchase Order Number	Insurance Claim Number	<ul style="list-style-type: none"> Claim number is for an insurance USER Corporate Class number is for a corporate USER Purchase order number is for a dealership USER
___ days @	Input	4	Number of Days Authorized	Number Of Days Authorized	
Direct Bill %:	Input	6	Percent Covered	Bill To %	Only visible to insurance USER
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Dollars Per Day Covered	Only visible to insurance and fleet USERS.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Max \$ Covered	Only visible to insurance and fleet USERS.
	Output	30	Rental Location Branch Name	Rental Location	
Date Rental Needed:	List Box	10	Rental Start Date	Start Date	
days @	List Box	6	Vehicle Rate	Vehicle Rate	
Insured Name:	Input	30	Insured's Name	First Name + Last Name	
Insured Name:	Output	20	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	25	Rental Location City Name	City	
	Output	10	Rental Location Postal / Zip Code	Zip Code	
	Output	3	Rental Location State / Province Code	State	
	Output	13	Rental Location Telephone Number	Telephone Number	
Date of Loss:	List Box	10	Date of Loss	Date Of Loss	Remove for corporate USERS
Date of Loss	Output	10	Date of Loss	Date Of Loss	Remove for corporate USERS
	Output	30	Renter's Address Line	Address Line	
Renter's Address	Output	20	Renter's City	City	
	Output	3	Renter's State /Province Code	State	

ARMS Redesign Project – Release 3.0
 Authorize a Request

Issue: v1.1
 Issue Date: 10/20/00

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	15	Renter's Zip/Postal Code	Zip Code	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	This field is input if the ticket is not opened. It will not be editable if the ticket is open.
Authoriz Direct Bill: for	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter:	Output	30	Renter's Name	First Name + Last Name	N/A.
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Owner's Vehicle	Output	20	Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
	Output	15	Repair Facility City	City	
Repair Facility	Output	20	Repair Facility Name	Repair Facility Name	
	Output	3	Repair Facility State	State	
	Output	10	Repair Facility Telephone Number	Telephone Number	
	Output	7	Repair Facility Zip Code	Zip Code	
Claim Type:	List Box	15	Claim Type	claim type description	N/A.
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	List Box	20	Loss Type	loss type description	
Vehicle Condition	Output	20	Type of Loss	loss type description	
	Input	20	Renter's Email	renter email	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.3.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The ARMS/Web database will be updated. The use case will then end and the USER will return to the process from which they came.

2.1.3.3 Notebook

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

2.1.3.4 Set Last Date

When clicked, the system will terminate the rental. The USER will be prompted to enter a termination date for this rental. This coincides with the use case MA-17-Terminate Rental.

ARMS Redesign Project – Release 3.0
Authorize a Request

Issue: v1.1
Issue Date: 10/20/00

2.1.3.5 Transfer File

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or USER currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

2.1.3.6 Change or Add

When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

2.1.3.7 Top of page

When clicked, the USER will be taken to the top of the current page.

2.1.3.8 View Car Class

When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

Enterprise Rent-A-Car

ARMS Web 3.0 Functional Design Specification Create Reservation

Version 1.4

Last Saved: 9/22/00 10:36 PM

Revision History

Date	Issue	Description	Author
2000-03-03	0.1	Initial Draft of this Functional Design Specification published	Russ Dittmar, Brent Armbruster, Anil Kabra, Sean O'Donnell, Brad Reel
2000-03-07	0.2	Modifications made to document structure	Sean O'Donnell
2000-03-13	0.3	Draft published to design team for review and comment	Sean O'Donnell, Rick Fowler, Brent Armbruster
2000-03-14	0.4	Draft published to QA design team for review and comment	Sean O'Donnell
2000-03-30	0.5	Comments of design team incorporated into the document.	Sean O'Donnell
2000-05-08	0.6	Initial management review comments and additional improvements included into the Create Reservation specification.	Sean O'Donnell
2000-05-19	0.7	Incorporated comments from the Iteration 2 cross-team QA process into the specification.	Sean O'Donnell
2000-05-24	0.8	Modified validation rule for Canadian Postal Code.	Sean O'Donnell
2000-05-30	0.9	Added Data Fields from DATA_FIELDS database	Cindy Bastean
2000-06-05	1.0	Version 1 of the Functional Design Specification published.	Sean O'Donnell
2000-07-12	1.1	Changes made based on feedback provided by management reviewers. Additional changes to screen design made based on Zefer prototype deliverables.	Sean O'Donnell
2000-08-15	1.2	Changes made based on feedback provided by management reviewers. Additional changes to screen design made based on Zefer prototype deliverables.	Sean O'Donnell
2000-09-11	1.3	Changes made based on feedback provided by testing team and the corresponding Defect Report. Additional changes to screen design made based on Zefer prototype deliverables.	Michael Slater
2000-09-22	1.4	Changes made based on feedback provided by business leads with respect to the future state of Release 3.0.	Michael Slater, Aaron Foster, Tim Weinstock

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Creat Reservation

1. Create Reservation Use Case

1.1 Application Overview

The following is a document used to illustrate the process for creating a reservation using ARMS Web 3.0. The intent for this release of the ARMS Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes how a USER would create a rental reservation in the ARMS Web system. When creating a reservation, the USER is also creating an authorization for payment. The USER may also submit a reservation without authorizing payment.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to create an authorized reservation. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the rental administrator would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS Web to create and confirm the reservation.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

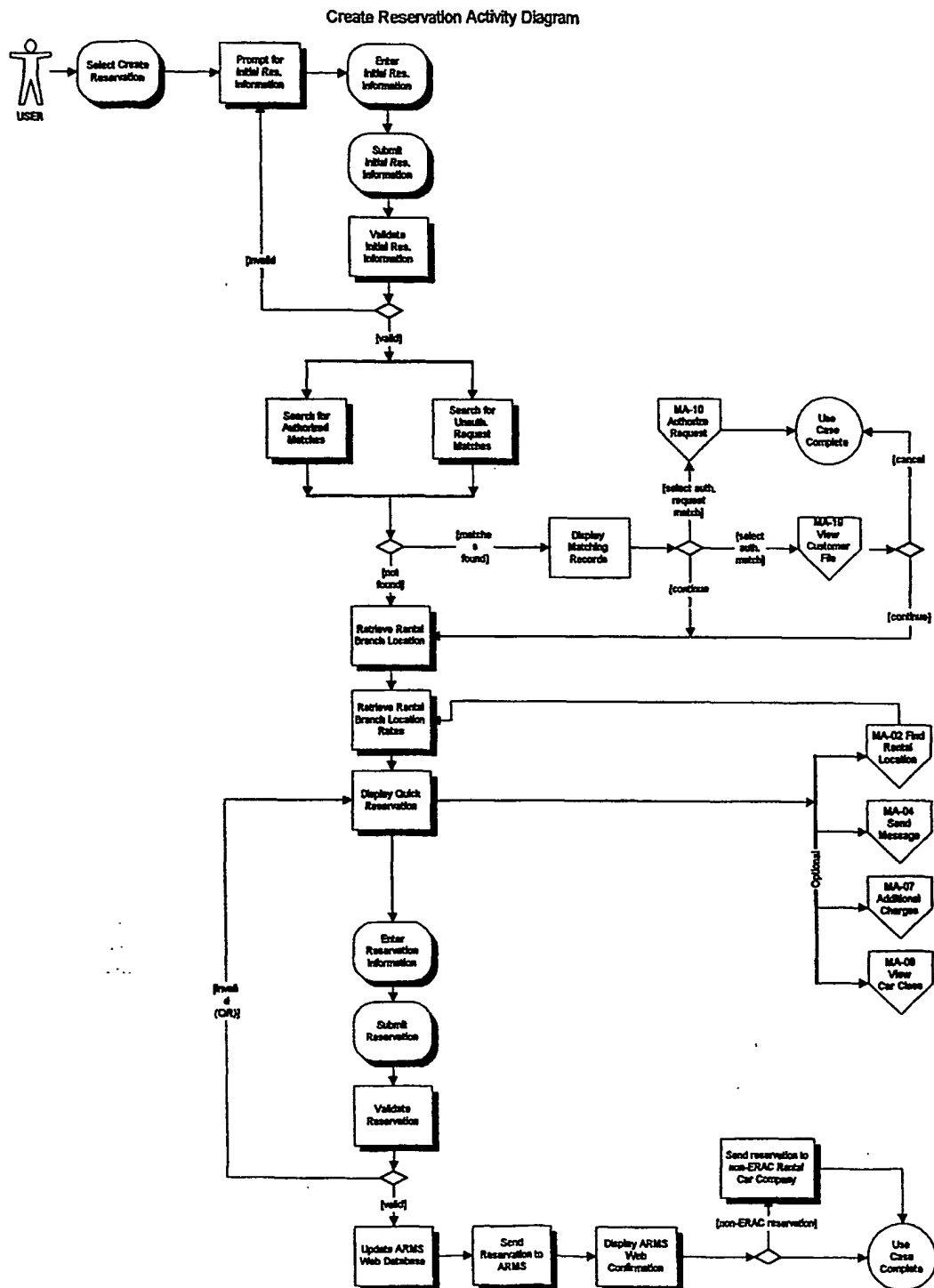
1.4 Pre-Conditions

- The USER must be signed in to the ARMS Web system.
- The USER must have the authority to create a reservation.

1.5 Flow of Events

The Flow of Events includes all steps necessary to create a reservation using the ARMS Web system.

1.5.1 Activity Diagram



1.5.2 Basic Flow

The Basic Flow of the Create Reservation use case includes all of the required steps for a new reservation to be created in the ARMS Web system. Shadowed boxes in the Activity Diagram indicate the Basic Flow.

1. The USER selects to create a reservation from the top navigation menu.
2. The system prompts the USER to enter initial information about the renter (Depending on the user segment):
 - Corporate Class Number or Claim Number (The use case will refer to this as 'Reference Number')
 - Bill Type
 - Renter First Name
 - Renter Last Name
 - Rental Company
 - Telephone Number or Postal Code where the renter would like to be picked up
3. The USER enters initial information about the renter.
4. The USER submits the initial reservation information to the system.
5. The system will validate the initial information entered by the USER¹.
6. The system will perform a search for previous authorizations that may correlate directly to the rental reservation that the USER is beginning to establish. The system will search for two key types of records:

- **Unauthorized Request Matches**

An Unauthorized Request is defined as a rental Authorization Request that is generated when The Rental Company creates a reservation or contract for the customer that has not been approved. This search helps to prevent the USER from creating a new reservation for a customer that has an outstanding Unauthorized Request in the ARMS system. The Unauthorized Request search is completed using the first three characters of the *Renter Last Name* and is limited to unauthorized requests (requests in unassigned or direct bill request statuses) for the selected *Office*. If matches are found, the Unauthorized Request/Authorized Request Search Matches Alternative Flow will be invoked.

- **Authorized Matches**

Reference numbers that have already been associated with a rental reservation or contract (i.e., Authorized Rentals) should be brought to the attention of the USER to help prevent over-authorization situations. The system will search for an exact corporate class number match on any reservation or ticket (open or closed) related to the company in the last six months. This search will be completed using the exact *Reference Number* on all authorized requests (requests in any status other than unassigned or direct bill request).

If no matching records are found, the Basic Flow continues.

7. The system will retrieve a rental branch location where the rental is needed based on the Telephone Number or Postal Code entered by the USER. If no location is found, a message should be generated notifying the USER that no location was available for the search criteria and that Claims Connection will handle the reservation (include the search criteria in message).

¹ See section 1.5.3.1 Initial Reservation Information Invalid in Alternative Flows on page 4 for validation rules.

8. The system will retrieve the current applicable rates for that rental branch location. If no rental branch location is available, the system will display an open text box to allow the USER to type in a rate.
9. The system will display the Quick Reservations screen.
10. The USER will enter the reservation information.
11. The USER submits the reservation to the system.
12. The system will validate the reservation information submitted by the USER².
13. The system updates the database.
14. The system sends the reservation to ARMS.
15. The system will display the reservation confirmation to the USER. The reservation confirmation will not include a confirmation number, but will incorporate a message that The Rental Company has received the reservation.
16. If the reservation is a non-Enterprise reservation, than the transaction is electronically transmitted to the intended rental car company's rental system.
17. This ends this use case.

1.5.3 Alternative Flows

The Alternative Flows of this use case can occur when certain conditions exist or specific USER feedback is provided.

1.5.3.1 Initial Reservation Information Invalid

If the initial reservation information is invalid (Step 5 of the Basic Flow), the system should present an error message to the USER and force the USER back into Step 2 of the Basic Flow.

1.5.3.1.1 It will be considered invalid if the Reference Number, Renter First Name, Renter Last Name, Rental Company, or Where Needed Value (Postal Code or Telephone Number) have not been included.

1.5.3.1.2 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number and the first three digits (i.e., area code) meet the criteria below:

- 0XX
- 1XX
- The second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

1.5.3.1.3 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number that does not consist of 10 digits.

1.5.3.1.4 It will be considered invalid if the 'where needed' search criteria is a U.S. postal code that does not consist of 5 or 9 digits.

² See section 1.5.3.3 Reservation Information Invalid in Alternative Flows on page 5 for validation rules.

1.5.3.1.5 It will be considered invalid if the 'where needed' search criteria is a Canadian postal code that does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

1.5.3.2 Unauthorized Request/Authorized Request Search Matches

If either the search for Unauthorized Requests or the search for Authorized Request matches returns a positive result (Step 6 of the Basic Flow), the matching records will be presented to the USER. The matching records should be provided in summary form, and be distinctly identified as either Authorized Request matches or potential Unauthorized Request matches.

- For Authorized Request matches, the USER will have the ability to select the Authorized Request and move into the MA-19 View Customer File use case to view the details of the previously authorized rental. The USER will have the option of continuing or canceling this use case from the MA-19 View Customer File use case.
- For Unauthorized Request matches, the USER will have the ability to select the Unauthorized Request and move into the MA-10 Authorize Request use case to review and/or perform operations on the Unauthorized Request.

If the customer does not appear as an Unauthorized Request or Corporate Class Number match, the USER can select to continue to Step 7 of the Basic Flow.

1.5.3.3 Reservation Information Invalid

If an error is discovered in the validation of the reservation information submitted by the USER (Step 12 of the Basic Flow), the system will present the USER with an error message and return them to Step 9 of the Basic Flow (NOTE: If the USER submitted information from the Detailed Reservation screen, they should be returned to the Display Detailed Reservation Alternative Flow above). If the error is specific to a data field within the form, the field should be highlighted and the error described.

1.5.3.3.1 It will be considered invalid if the Reference Number, Renter First Name, Renter Last Name, Vehicle Condition, Rental Location, Authorized Number of Days, and at least one Renter Telephone number have not been included.

1.5.3.3.2 It will be considered invalid if the customer has established Reference Number editing and the Reference Number format does not meet the requirements of the customer's Reference Number definition. Reference Number definition is completed as part of the company profile³.

1.5.3.3.3 It will be considered invalid if any field identified as REQUIRED in the company/office profile is not included.

1.5.3.3.4 It will be considered invalid if any data entered violates the data type as specified by the ARMS Web database (i.e., alpha characters in a numeric field).

1.5.3.3.5 A warning will be presented to the USER if any defined limits identified in the company/office/user profile are exceeded (e.g., Maximum Number of Days Authorized). The system will allow the USER to submit the authorization from the warning.

³ Claim Number format definition will be defined in some cases in both the ARMS Web system and in the ARMS/400 system (e.g., Nationwide, GEICO). Claim number definition will have to be maintained in BOTH systems in cases where this overlap exists. We are unable to reuse the claim number format definitions due to technical complications.

1.5.3.3.6 It will be considered invalid if the Authorized Number of Days is included and is less than zero (0).

1.5.3.3.7 It will be considered invalid if the Date of Loss is greater than the current date.

1.5.3.3.8 It will be considered invalid if the first three digits (i.e., area code) of any U.S. or Canadian telephone number meet the criteria below:

- 0XX
- 1XX
- The second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

1.5.3.3.9 It will be considered invalid if a U.S. or Canadian telephone number does not consist of 10 digits.

1.5.3.3.10 It will be considered invalid if a U.S. postal code does not consist of 5 or 9 digits.

1.5.3.3.11 It will be considered invalid if a Canadian postal code does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

1.5.3.3.12 It will be considered invalid if an E-mail address is included that does not include an '@' character.

1.5.3.4 Cancel Use Case

The USER should be capable of canceling the use case at any point prior to the submission of the reservation to the ARMS Web database. The USER should be returned to the previous activity/page that the USER was on prior to entering this use case.

1.6 Post-Conditions

- If successful, a reservation authorization is sent to ARMS.
- If unsuccessful, the system state will be unchanged.

1.7 Special Requirements

1.7.1 Requirements for Reference Number Formatting

The following statements are a set of requirements for providing custom reference number formatting for a customer. The ARMS Web system will allow customer companies to define a specific layout or format that they use as their standard reference number format, so that the reference number field used in the system is presented as separate fields and are easily recognizable and 'intuitive' to the USER. These requirements will be implemented to all system functions where the customer reference number is used.

- 1.7.1.1** Customers must have the ability to define their reference number format (and in some cases, validations on specific portions of the reference number format) as part of the company profile. More than one reference number format can be stored per company, and each reference number format definition must have a unique identifier/name. The selection of which reference number format to use should be defined as part of the office profile using the reference number format unique identifier/name.
- 1.7.1.2** Reference numbers will be defined in 'segments'. Each segment will be presented to the USER as a separate field. For example, if the reference number format for the COMPANY were 45-A7456-1207, the reference number format would be defined to the system as a 2-character numeric field, a 5-character alphanumeric field, and a 4-character numeric field.
- 1.7.1.3** Customers must have the ability to define a set of 'valid values' for any given segment of the reference number format. Valid Values allow the customer to dictate what the valid entries for a given reference number segment would include. For example, if the second segment in the customer's reference number format must be a state abbreviation, the customer could define valid values for that segment as 'AL', 'AR', 'AK', etc. If the USER does not enter one of the valid values, an error would be generated to notify the USER to enter a 'valid' value. If no valid values are included for a reference number segment, all entry in to the field will be considered valid (assuming that the data type is correct). If valid values are specified, entry into the reference number segment **MUST MATCH ONE OF THE VALID VALUES IDENTIFIED**.
- 1.7.1.4** The system will display the reference number field(s) as it is described by the reference number format definition for the office.
- 1.7.2 Requirements for Finding Rental Location**
Below are the requirements for finding a rental location, across multiple rental car companies, in the ARMS Web system. ARMS Web will resolve a rental location and pass the location to ARMS for routing (which is a deviation from current state handling). These requirements were derived from the current state business requirements for the ARMS locator system.
- 1.7.2.1 ARMS Web will always return a Rental Company's branch location for a reservation. For all ARMS Web reservations, the following rules for finding a rental location apply:**
- 1.7.2.1.1** For United States locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest branch that accepts ARMS reservations.
- 1.7.2.1.2** For International locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest open branch that accepts ARMS reservations. If no open branches are found, the closest branch that accepts ARMS reservations should be returned.

- 1.7.2.2 When the rental branch location is determined, the system will retrieve the name, shipping address, telephone number and rates of the rental branch location and present them to the USER on the Create Reservation screen(s).
- 1.7.2.3 The system will only display Claims Connection (7680) as the location (with no rates) when no location can be found within the 50-mile radius. If Claims Connection is displayed, a message should be included to indicate that no rental branch location was found within a 50-mile radius of the search criteria, and Claims Connection will ensure that the reservation is handled appropriately.

1.7.3 Requirements for Routing a Reservation

When a reservation is submitted to the ARMS Web system, routing of the reservation is required to ensure that the renter is called within two hours to confirm rental details. Routing is done AFTER the reservation has been submitted to the ARMS Web system, and is transparent to the USER. The reservation can be routed to the selected rental branch, to Claims Connection, or to a regional call center based on the following rules:

NOTE: These requirements were derived from the current state business requirements for the ARMS locator system.

- 1.7.3.1 The system should automatically route submitted reservations to Claims Connection between Friday 11:00pm and Sunday 11:00pm, regardless of whether the selected rental branch location is open or not.

- 1.7.3.2 The system should determine if the selected rental branch location on a submitted reservation is open or closed.

1.7.3.2.1 If the selected branch is open, the submitted reservation should be routed directly to the rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below).

1.7.3.2.2 If the selected rental branch location is closed, the system will determine if the company that submitted the reservation has established after-hours handling of reservations. If the company has not established after-hours handling, the reservation is routed to the selected rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below). If the company has established after-hours handling, the following rules apply:

1. The system will check the hours of availability for Claims Connection. Claims Connection Hours are 5:00 a.m. - 11:00 p.m. CST, 7 days a week⁴.
 - a. If Claims Connection is open, the reservation will be routed to Claims Connection. (The insurance company customer, National Marketing and the Claims Connection Manager will determine whether or not Claims Connection makes a courtesy call to the renter).
 - b. If Claims Connection is closed, the closest branch hours are checked to see if they will be open within 8 hours. If the branch will be open in 8 hours, the reservation will be routed to the rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below). If the branch will not be open in the next 8 hours, the reservation will be routed to Claims Connection.

- 1.7.3.3 The system should determine if the selected rental branch location on a submitted reservation

⁴ Although we receive reservations 24 hours/day, 7 days/week, we do not route them between 11:45pm and 4:30am (CST). The only exception to this is Saturday night to Sunday.

has a regional call center.

1.7.3.3.1 If the selected rental branch location has a call center to handle customer callbacks, the reservation should be routed to the call center.

1.7.3.3.2 If the selected rental branch location does not have a call center to handle customer callbacks, the reservation should be routed to the rental branch location.

1.7.3.4 *The system should provide specific feedback indicating the reason a reservation was re-routed when the Authorization Confirmation is received. This will allow the USER to be aware of the reason for the change of location if they access the reservation while it is owned by someone other than the rental branch location selected when the reservation was originally submitted.*

1.7.3.4.1 If the reservation is re-routed to Claims Connection because the selected rental branch location was closed, the system should provide a message (that will be accessible through the diary notes/notebook) that states the reservation was routed to Claims Connection because the rental branch location was closed when the reservation was submitted.

1.7.3.4.2 If the reservation is re-routed to a regional call center to expedite the callback process, the system should provide a message (that will be accessible through the diary notes/notebook) that states the reservation was routed to a regional call center to expedite the renter callback process.

1.7.3.5 *The system should include a message/note with the group/branch number and address of the rental branch location selected by the USER if the reservation is routed to any location (i.e., Claims Connection or otherwise) other than the rental branch location selected by the USER.*

1.7.4 Maintenance of Source Systems

This use case requires that information in the existing Locator and Special Instructions (AS/400) databases be kept current and it is assumed that the group responsible for maintaining these databases will continue to do so in the future. Locator is used to retrieve Rental Branch Location information, and Special Instructions is used to retrieve rate information for a selected rental branch location.

1.8 Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below.

1.8.1 MA-10 – Authorize Request

The Authorize Request use case will be used to allow the USER to view and perform operations on an outstanding Unauthorized Request. The USER will not be returned to this use case on completion of the Authorize Request use case.

1.8.2 MA-19 – View Customer File

The View Customer File use case will be used to allow the USER to view the customer file when a matching authorized request is found and selected. The USER will have the option of ending the use case or be returned to Step 9 of the Basic Flow on completion of the View Customer File use case.

1.8.3 MA-02– Find Rental Location

The Find Rental Location use case will be used to allow the user to find one or more alternate rental branch locations that can provide service to the customer. The USER should be returned to Step 9 of the Basic Flow upon completion of the Find Rental Location use case. If the USER selects a rental branch location, branch information (i.e., address, phone) should be returned and the appropriate fields should be populated on the Reservation screen.

1.8.4 MA-04-Send Message

The Send Message use case will allow the USER to send a message to the Rental Company branch regarding the reservation, or select to store the message text with the reservation as a diary note (which is not sent to the branch). The USER should be returned to Step 9 of the Basic Flow upon completion of the Send Message use case.

1.8.5 MA-07-Additional Charges

The Additional Charges use case will be used to add special charges to the reservation being created by the USER. The USER should be returned to Step 9 of the Basic Flow upon completion of the Additional Charges use case. Any Additional Charges captured should be returned and applied to the reservation. The existence of Additional Charges should be reflected on the reservation screen.

1.8.6 MA-08-View Car Classes

The View Car Classes use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The USER should be returned to Step 9 of the Basic Flow upon completion of the View Car Classes use case. The car class selected by the USER should be applied to the reservation.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Initial Reservation Screen

The *Initial Reservation* screen provides the user interface and functions to support Steps 2 through 4 of the Basic Flow. The information captured on this screen will allow the system to perform several background search activities, and help to better construct the Quick/Detailed Reservation screen. All information captured on the *Initial Reservation* screen is required to create a new reservation, and is reused later in the reservation creation process.

2.1.1 Screen Layout

(ARMS Web 2.0)

Initial Reservation

Claims Office: Handling for:

Welcome back, Fitzgerald, Neil.

System please find the action items that require your attention.

To see the Action Items, click the column title of your chosen sorting method
(see below by date, click "DATE RECEIVED")

DATE RECEIVED	RENTAL NAME	CLAIM NUMBER	COLLECTOR
05-01-00	Bowie, David	234567871	Fitzgerald, Neil
05-01-00	Weber, Andrew	754567877	Fitzgerald, Neil
05-01-00	Smith, John	123456789	Fitzgerald, Neil
05-01-00	Johnson, John	987654321	Fitzgerald, Neil
05-01-00	Smith, John	123456789	Fitzgerald, Neil
05-01-00	Johnson, John	987654321	Fitzgerald, Neil
05-01-00	Smith, John	123456789	Fitzgerald, Neil
05-01-00	Johnson, John	987654321	Fitzgerald, Neil

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(Insurance User)

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

Last Name:
First Name:
Claim Number:
Claim Type:
please choose
please choose
phone:
Fax:

Welcome back, Fitzgerald, Neil.
Below please find the action items that require your attention.

To sort the Action Items, click the column title of your chosen sorting method
(to sort by date, click "DATE RECEIVED")

DATE RECEIVED	REPORT NAME	CLAIM NUMBER	REPORT COMPANY	ADMINISTRATOR
05-01-00	Bowie, David	234587871	HLE Rent-A-Car	Fitzgerald, Neil
05-01-00	Simmons, James	754589877	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Weber, Andrew	754589877	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	CYRIL, BILL	234587871	HLE Rent-A-Car	Fitzgerald, Neil
05-15-00	(5) Invoices		Car Temps	Fitzgerald, Neil
05-15-00	(2) Action Items		Enterprise Rent-A-Car	Unassigned

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(Fleet User)

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Office: 001 Handling for: Yourself

Last Name:
First Name:
Claim Number:
Claim Type:
please choose
please choose
phone:
Fax:

Welcome back, Fitzgerald, Neil.
Below please find the action items that require your attention.

To sort the Action Items, click the column title of your chosen sorting method
(to sort by date, click "DATE RECEIVED")

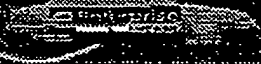
DATE RECEIVED	REPORT NAME	CLAIM NUMBER	REPORT COMPANY	ADMINISTRATOR
05-01-00	Bowie, David	234587871	HLE Rent-A-Car	Fitzgerald, Neil
05-01-00	Simmons, James	754589877	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Weber, Andrew	754589877	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	CYRIL, BILL	234587871	HLE Rent-A-Car	Fitzgerald, Neil
05-15-00	(5) Invoices		Car Temps	Fitzgerald, Neil
05-15-00	(2) Action Items		Enterprise Rent-A-Car	Unassigned

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(Dealership User)

Enterprise		Welcome to the Automated Rental Management System		
Create a RESERVATION	Find a CUSTOMER	SEARCH BY: [DATE RECEIVED] [NAME] [PHONE] [ADDRESS]		
Office: [001]		Handling for: [Yourself]		
Welcome back, Fitzgerald, Neil.				
Below please find the action items that require your attention.				
To sort the Action Items, click the column title of your chosen sorting method (ex: to sort by date, click "DATE RECEIVED")				
DATE RECEIVED	RENTAL NAME	REFERENCE NUMBER	RENTAL COMPANY	ACTION REQUIRED
01-23-00	Bowie, David	234567891	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Bowie, David	234567891	HLE Rent-A-Car	Fitzgerald, Neil
05-01-00	Weber, Andrew	754569677	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Weber, Andrew	754569677	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Cleveland, Emily	754569677	Enterprise Rent-A-Car	Fitzgerald, Neil
06-15-00	[5] Invoices		Car Temps	Fitzgerald, Neil
06-15-00	[23] Action Items		Enterprise Rent-A-Car	Deas-Simpson

(Corporate User)



**create a
RESERVATION** *first a
CUSTOMER*

last name

first name

expiration class number

rental company

please choose

where/when cash value
car is needed:

Welcome to the Automated Rental Management System


Office: Handling for:

Welcome back, Fitzgerald, Neil.

Below please find the action items that require your attention.

To sort the Action Items, click the column title of your chosen sorting method
(or to sort by date, click "DATE RECEIVED")

DATE RECEIVED	RENTER'S NAME	COMPASS BLACK NUMBER	RENTAL COMPANY	ADMINISTRATOR
04-29-00	Henny, Tom	23456787	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Bowie, David	234567871	HLE Rent-A-Car	Fitzgerald, Neil
05-01-00	Simpson, Homer	23456787	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Weber, Andrew	76543210	Enterprise Rent-A-Car	Fitzgerald, Neil
05-01-00	Coyote, Phil	76543210	Rent-A-Wreck	Fitzgerald, Neil
05-15-00	(5) Invoices		Car Temps	Fitzgerald, Neil
05-15-00	(3) Action Items		Enterprise Rent-A-Car	Fitzgerald, Neil



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2.1.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter First Name	Text	15	Renter First Name	First Name	Renter First Name is a required field.
Renter Last Name	Text	20	Renter Last Name	Last Name	Renter Last Name is a required field.
Claim Number Purchase Order Number Corporate Class Number	Text	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	'Reference' Number is a required field. 'Reference' number should be presented in separate fields to correspond to the reference number format (segments) that has been defined by the USER profile. Insurance User – Claim Number Fleet User – Claim Number Dealership User – Purchase Order Number Corporate User – Corporate Class Number
Claim Type Bill Type	Combo Box	20	Rental Type Description	Rental type description	The values of the Rental Type field for the Insurance user class are: 'Insured', 'Claimant', 'Theft' and 'Uninsured'. The default value is '-Select Claim Type-'. Claim Type is a required field.
	Text	15	Where Needed Value	Day Phone or Zip Code	Where Needed Value is a required field.
Postal Code	Radio Button	1	Where Needed Postal Code Indicator	NOT STORED	If the Where Needed Postal Code Indicator is set, the Where Needed Value should pre-populate the Renter Zip/Postal Code on the Quick/Detailed Reservation screen.
Phone	Radio Button	1	Where Needed Telephone Indicator	NOT STORED	This should be the default radio button selected. If the Where Needed Telephone Indicator is set, the Where Needed Value should pre-populate the Renter Phone Number 1 on the Quick/Detailed Reservation screen.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Create Reservation

The **Create Reservation** screen function will allow the **USER** to submit the information on the *Initial Reservation* screen and move on in the create reservation process. The system will use this information to perform background searches for Unauthorized Requests and Corporate Class Number Matches, and to build the Quick/Detailed Reservation screen appropriately.

2.1.3.1.1 The **Create Reservation** screen function is invoked through either a button click or an **Enter** keystroke.

2.1.3.1.2 The information captured on the *Initial Reservation* screen will be used to pre-populate the

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Create Reservation

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Issue Date: 9/22/2000

corresponding fields on the Quick/Detailed Reservation screen.

2.1.3.1.3 If the information submitted to the ARMS Web application is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

2.2 Authorization Matches Found Screen

The *Authorization Matches Found* screen provides the functions to support the Unauthorized Request/Authorized Request Search Matches alternative flow.

2.2.1 Screen Layout (ARMS Web 2.0)

Claims Office: 001 Handling for: Self

Please verify the reservation you want to create does not exist.
If it exists, you can click the link to view the file or process it.

Matches Found: You requested a reservation for: Hanks, Tom
Claim Number: 765849322 Claim Type: Claimant

Claim No.	Customer Name	Status	Date Rental Began	Rental Amount
765849322-001	Hanks, Tom	Open	04/23/2000	\$100.00
765849322-002	Hanks, Tom	Open (Customer's car)	04/23/2000	\$125.00

2 Claims in the list

Claim No.	Customer Name	Status	Date Rental Began
765849322-001	Hanks, Tom	Default Rent Request	04/23/2000
8902-0710	Hanks, Tom	Open (Customer's car)	04/18/2000
8902-0711	Hanks, Tom	Open (Customer's car)	04/18/2000

2 Claims in the list

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[Create a RESERVATION](#) [Find a CUSTOMER](#)

Claims Office: 001 Handling for: Yourself

Please verify the reservation you want to create does not exist.
If it exists, you can click the link to view the file or process it.

Matches Found: You requested a reservation for: Hanks, Tom
Claim Number: 765849322 Claim Type: Claimant

Claim No.	Customer Name	Status	Date Rental Requested	Invoice Amount	Rental Company
765849322-001	Hanks, Tom	Closed	04/28/2000	\$200.00	Enterprise Rent-A-Car
765849322-002	James, Bill	Open (Claimant in car)	04/18/2000	\$200.00	Enterprise Rent-A-Car

2 Matches in the list

Claim No.	Customer Name	Status	Date Rental Requested	Rental Company
765849322-001	Hanks, Tom	Closed (Bill Requested)	04/28/2000	Enterprise Rent-A-Car
880254321	James, Bill	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car
880254321	Hanks, Tom	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car

3 Matches in the list

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Office: 001 Handling for: Yourself

Please verify the reservation you want to create does not exist.
If it exists, you can click the link to view the file or process it.

Matches Found: You requested a reservation for: Hanks, Tom
Claim Number: 765849322 Claim Type: Claimant

Claim No.	Customer Name	Status	Date Rental Requested	Invoice Amount	Rental Company
765849322-001	Hanks, Tom	Closed	04/28/2000	\$200.00	Enterprise Rent-A-Car
765849322-002	James, Bill	Open (Claimant in car)	04/18/2000	\$200.00	Enterprise Rent-A-Car

2 Matches in the list

Claim No.	Customer Name	Status	Date Rental Requested	Rental Company
765849322-001	Hanks, Tom	Closed (Bill Requested)	04/28/2000	Enterprise Rent-A-Car
880254321	James, Bill	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car
880254321	Hanks, Tom	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car

3 Matches in the list

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Office: 001 Handling for: Yourself

Please verify the reservation you want to create does not exist.
If it exists, you can click the link to view the file or process it.

Matches Found: You requested a reservation for: Hanks, Tom
Purchase Order Number: 765849322 Bill Type: Claimant

Purchase Order No.	Customer Name	Status	Date Rental Requested	Invoice Amount	Rental Company
765849322-001	Hanks, Tom	Closed	04/23/2000	\$200.00	Enterprise Rent-A-Car
765849322-002	Hanks, Bob	Open (Customer in car)	04/18/2000	\$250.00	Enterprise Rent-A-Car

2 items in the list

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Office: 001 Handling for: Yourself

Please verify the reservation you want to create does not exist.
If it exists, you can click the link to view the file or process it.

Matches Found: You requested a reservation for: Hanks, Tom
Corporate Class Number: 765849322

Corporate Class No.	Customer Name	Status	Date Rental Requested	Invoice Amount	Rental Company
765849322-001	Hanks, Tom	Closed	04/23/2000	\$200.00	Enterprise Rent-A-Car
765849322-002	Hanks, Bob	Open (Customer in car)	04/18/2000	\$250.00	Enterprise Rent-A-Car

2 items in the list

Corporate Class No.	Customer Name	Status	Date Rental Requested	Rental Company
765849322-001	Hanks, Tom	Closed (Customer in car)	04/23/2000	Enterprise Rent-A-Car
680214213	Hanks, Bob	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car
680214213	Hanks, Bob	Open (Customer in car)	04/18/2000	Enterprise Rent-A-Car

2 items in the list

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2.2.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling for:	Output	35	User Name	First Name + Last Name	Should be presented as User First Name + User Last Name
Office	Combo Box	10	Office Location	external organization abbreviated name	<p>The values presented in the Office Location list should be limited to the offices that the user has been granted the authority to create a reservation.</p> <p>The default selection is the last selected office location. If the user has not selected an office, the default selection is the user's default office as defined in the user profile.</p> <p>Office is a required field</p>
Renter Name	Output	35	Renter Name	First Name + Last Name	<p>Should be presented as 'Renter Last Name + ", " + Renter First Name'</p> <p>Should provide a hyperlink to the corresponding Authorize Request record (see MA-10 Authorize Request use case).</p> <p>This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen</p>
Claim Number Purchase Order Number Corporate Class Number	Output	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>Should provide a hyperlink to the corresponding Unauthorized Request record.</p> <p>This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen</p> <p>Insurance User - Claim Number Fleet User - Claim Number Dealership User - Purchase Order Number Corporate User - Corporate Class Number</p>
Status	Output	15	Authorization Status	Status Description	This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter Name	Output	20	Renter Name	First Name + Last Name	Should be presented as Renter Last Name + Renter First Name Should provide a hyperlink to the corresponding Customer File. This field is in the "Authorized Request Matches" section of the "Authorization Matches Found" screen
Claim Number Purchase Order Number Corporate Class Number	Output	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	Should provide a hyperlink to the corresponding Customer file. This field is in the "Reference Number Matches" section of the "Authorization Matches Found" screen Insurance User – Claim Number Fleet User – Claim Number Dealership User – Purchase Order Number Corporate User – Corporate Class Number
Claim Type Bill Type	Output	20	Rental Type Description	Rental type description	This field is in the "Reference Number Matches" section of the "Authorization Matches Found" screen Insurance User – Claim Type Fleet User – Claim Type Dealership User – Bill Type
Status	Output		Authorization Status	Status Description	This field is in the "Reference Number Matches" section of the "Authorization Matches Found" screen
Authorized Amount	Output	9	Authorized Total Amount	CALCULA TED	This field is in the "Reference Number Matches" section of the "Authorization Matches Found" screen

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 New Reservation

The **New Reservation** screen function button will allow the USER to close/continue beyond the *Authorization Matches Found* screen.

2.2.3.1.1 The **New Reservation** screen function is invoked through either a button click or through an **Enter** keystroke.

2.3 Quick Reservation Screen

The *Quick Reservation* screen provides support for Step 9 of the Basic Flow.

IMPORTANT NOTE: This is the minimum allowable set of fields on the *Quick Reservation* screen. The *Quick Reservation* screen will also include any fields indicated as QUICK RESERVATION in the company/office profile! See the Detail Reservation screen for all available fields.

2.3.1 Screen Layout (ARMS Web 2.0)

Create Reservation:
QUICK FORM for Coppola, Francis Claim no.754589877
[\[view long form \]](#)

GEICO

* Denotes required field

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ARMS Redesign Project - Release 2.0

Issue: v1.4

Create Reservation

Issue Date: 9/22/2000

(Insurance User)

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Create Reservation:
QUICK FORM for Coppola, Francis Claim no.754589877 **GEICO**

* Denotes required field

RENTAL INFORMATION

Authorized Days: **Select a rate**

Policy: Daily Rate: **20/500**

Maximum Dollars:

Percent of Limit: **100**

Vehicle Condition: **Driveable**

RENTER INFORMATION

Last: First:

Email: ☐ send email confirmation

Phone Number: Fax:

 Home ☐ Pick up location

 Home ☐ Pick up location

NOTES

Note to Rental Company:

Note to Self Only:

Location closest to: **773-395-6200**

Enterprise Edgewater Branch
2400 N. Ashland
Chicago, IL 60627
773-334-6400

☐ Pick different location

Change to a Favorite Location

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ADDITIONAL INFORMATION

Claim Number:

Repair Facility:

Claim Type: **Claimant**

City:

Date of Loss: **January** **1** **2000**

State/Province: **AB** Post Code:

Date Rental Needed: **January** **1** **2000**

Insured Name: Phone:

Last: First:

Renters Vehicle:

year make/model

Additional Charges: **None**

Renter's Address:

Renter's City:

State/Province: **AB**

Post Code: ☐ Pick up location


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ARMS Redesign Project - Release 2.0
Create Reservation

Issue: v1.4
Issue Date: 9/22/2000

(Fleet User)



Welcome to the Automated Rental Management System

[create a RESERVATION](#)
[find a CUSTOMER](#)

Office:
Handling for:

Create Reservation:

QUICK FORM for Coppola, Francis Claim no.754569877 GEICO

* Denotes required field

RENTAL INFORMATION:

Authorized Days:

Policy: Daily rate:

Maximum dollars:

Protection Coverage:

NOTESBOOK:

Note to Rental Company:

RENTER INFORMATION:

Last: First:

Email: ☐ send email confirmation

Phone Numbers: Ext:

☐ Pick up location

☐ Pick up location

Location closest to: 773-395-6268

Enterprise Edgewater Branch
6400 N. Ashland
Chicago, IL 60622
773-334-5400

Pick different location:

[top of page](#)

ADDITIONAL INFORMATION:

Claim Number:

Claim Type:

Date of Loss:

Date Rental Needed:

Insured Name:

Additional Charges: None

Repair Facility:

City:

State/Province: Post Code:

Phone:

Renter's Vehicle:

Y/N: make/model

Renter's Address:

Renter's City:

State/Province: Post Code:

☐ Pick up location

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ARMS Redesign Project - Release 2.0

Create Reservation

Issue: v1.4

Issue Date: 9/22/2000

(Dealership User)



Welcome to the
Automated Rental Management System

Create a
RESERVATION

find a
CUSTOMER

Office:
Handling for:

Create Reservation:

QUICK FORM for Coppola, Francis Claim no.754589877

GEICO

* Denotes required field

RENTAL INFORMATION

Authorized Driver:

Purchase Order Number:

RN Type:

NOTES

Note to Rental Company:

Note to Self Only:

RENTER INFORMATION

Last: First:

Email: ☐ send email confirmation

Phone Numbers:

Location changed to: 773-395-6200

Enterprise Edgecar of Chicago

6400 N. Ashland

Chicago, IL 60622

773-395-6400

Pick different location

[top of page](#)

ADDITIONAL INFORMATION

Date of lease:

Date Rental Needed:

Insured Name:

Last: First

Additional Charges: None

Repair Facility:

City:

State/Province: Post Code:

Phone:

Renter's Vehicle:

year make/model

Renter's Address:

Renter's City:

State/Province: Post Code:

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(Corporate User)

Welcome to the
Automated Rental Management System

[create a RESERVATION](#) [find a CUSTOMER](#) [rental history](#) [cancel reservation](#) [rental location](#) [rental rates](#) [rental terms](#)

Office: Handling for:

Create Reservation:
QUICK FORM for Coppola, Francis Claim no.754589877 GEICO

* Dashes required field

RENTAL INFORMATION:		NOTES/DOK:	
Authorized Days: <input type="text"/>	Select a rate: <input type="text"/>	Note to Rental Company: <input type="text"/>	
Corporate Class Number: <input type="text"/>		Note to Self Only: <input type="text"/>	
RENTER INFORMATION:		Location closest to: 773-399-6200	
Last: <input type="text"/>	First: <input type="text"/>	Enterprise Edgewater Branch	
Email: <input type="text"/>	<input type="checkbox"/> Send email confirmation	6400 N. Ashland	
Phone Numbers: <input type="text"/>	Cell: <input type="text"/>	Chicago, IL 60622	
<input type="text"/>	Home: <input type="text"/>	773-394-5400	
<input type="text"/>	Home: <input type="text"/>	<input type="checkbox"/> Pack different location	
<input type="checkbox"/> Pack up location		<input type="text" value="Change to a Favorite Location"/>	
<input type="checkbox"/> Pick up location		<input type="text"/>	

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ADDITIONAL INFORMATION:

Date Rental Needed:

Additional Charges: Note

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2.3.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	35	User Name	First Name + Last Name	Should be presented as 'User First Name + User Last Name
Office	Combo Box	10	Office Location	external organization identifier	<p>The default value should be the primary office of the current user.</p> <p>The values presented in the Office Location list should be limited to the offices that the user has been granted the authority to create a reservation.</p> <p>If changed, the system should automatically refresh the screen and update the "Handling for" list to the users in the newly selected office with the ability to create a reservation</p>
Handling for	Combo Box	35	Handling for	First Name + Last Name	<p>The combo list should include the users for the selected office location that have the authority to create a reservation.</p> <p>The default value should be 'Yourself'</p> <p>The handling for users should be presented as User Last Name + User First Name in alphabetical order</p>
Claim Number Purchase Order Number Corporate Class Number	Text Box	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>Should be populated by the Reference Number entered on the Initial Reservation screen.</p> <p>Reference number should be presented in separate fields to correspond to the claim number format (segments) that has been defined by the USER profile.</p> <p>If changed, the system should validate that no matching reference numbers exist (i.e., reference number matching). The user should be notified if a match exists.</p> <p>Reference Number is a required field.</p> <p>Insurance User – Claim Number Fleet User – Claim Number Dealership User – Purchase Order Number Corporate User – Corporate Class Number</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Type Bill Type	Combo Box	20	Rental Type Description	Rental type description	Should be populated by the Rental Type selected on the Initial Reservation screen. The values of the Rental Type field for the Insurance user class are: 'Insured', 'Claimant', 'Theft', and 'Uninsured'. Claim Type is a required field
Vehicle Condition	Combo Box	20	Vehicle Condition	Driveable Flag + Repairable Flag	The values of the Vehicle Condition field should include: 'Driveable', 'Non-Driveable', and 'Total Loss'. The default value should be '-Select Vehicle Condition-'.
Renter First Name	Text	15	Renter First Name	First Name	Should be populated by the Renter First Name entered on the Initial Reservation screen. If the Renter First Name changes, and an exact / Unauthorized request match exists on the Renter First Name + Renter Last Name combination, the user will be notified of this match. Renter First Name is a required field.
Renter Last Name	Text	20	Renter Last Name	Last Name	Should be populated by the Renter Last Name entered on the Initial Reservation screen. If the Renter Last Name changes, and an exact Unauthorized request match exists on the Renter First Name + Renter Last Name combination, the user will be notified of this match. Renter Last Name is a required field.
	Combo Box	10	Renter Phone Type 1		The combo list should include the values: 'Home', 'Work', 'Mobile', and 'Pager' The default value should be 'Select Type'
	Text	15	Renter Phone Number 1	Day Phone	If the Where Needed criterion entered on the Initial Reservation or Find a Rental Location screen was 'Telephone', the Where Needed Value from the screen should be populated in this field. At least one renter phone number is required.
	Text	5	Renter Phone Extension 1	Renters Day Phone Extension	N/A

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Post Code	Text	10	Renter Postal Code	Zip Code	If the Where Needed criterion entered on the Initial Reservation or Find a Rental Location screen was 'Postal Code', the Where Needed Value from the screen should be populated in this field.
Email address	Text Box	50	email Address		N/A
Send email confirmation to the renter	Check Box	1	email Confirmation Indicator		This field will default to unchecked.
Authorized Days	Text	3	Authorized Number of Days	Number Of Days Authorized	The Number of Days is a required field.
Policy Limits	Combo Box	10	Policy Daily Limit and Policy Maximum	Dollars Per Day Covered + Max \$ Covered	<p>The combo list should include the policy daily and maximum limits as defined in the company/office profile.</p> <p>The policy limits should be presented as 'Policy Daily Limit + "/" + Policy Maximum Limit"</p> <p>This field should default to 'Select Policy Limits' if the Claim Type is 'Insured', 'Uninsured Motorist', or 'Theft'.</p> <p>If the Claim Type is 'Claimant', this field should NOT be displayed.</p> <p>'Other' should be a selection in the list of options. If selected, the system will automatically replace the combo box with an open text box to allow the USER to type in a Daily Policy Limit, and a second open text box to allow the USER to type in a Maximum Policy Limit.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Combo Box	20	Authorized Rate	Vehicle Rate	<p>This field should be a combo box that lists all of the rates and car classes for the rental branch location in the format 'Rate + " " + Car Class'</p> <p>'Other' should be a selection in the list of options. If selected, the system will automatically replace the combo box with an open text box to allow the USER to type in a rate. A combo box should also be included that allows the USER to select a car class with selections to include 'Economy', 'Compact', 'Intermediate', 'Standard', and 'Full Size'.</p> <p>If the reservation is for an 'Insured', 'Uninsured', or 'Theft' Claim Type, the default selection for the field should be '- Policy Limits'.</p> <p>If the reservation is for an 'Claimant' Claim Type, the default selection for the field should be '-Select a rate-'.</p>
Additional Charge	Output		Additional Charges		Should include the Additional Charge Description, the Additional Charge Value, and the Additional Charge Type. More than one additional charge can exist.
Direct Billing %	Text	3	Authorized Direct Bill Percent	Bill To %	<p>The Direct Bill % should default to 100%.</p> <p>The Direct Bill % is a required field</p>
Authorized Total Amount	Output	9	Authorized Total Amount	CALCULATED	<p>The authorized total amount field should show the total amount (w/o taxes and gov't surcharges) authorized based on the Number of Days Authorized, Rate, Policy Limits, and Direct Bill percent entered by the user.</p> <p>This field will calculate the total amount to be authorized (based on entry) when the USER clicks the Calculate screen function.</p>
Rental Location	Output	30	Rental Location Branch Name	Branch Name	N/A
	Output	30	Rental Location Address	Address Line	N/A
	Output	30	Rental Location Address	Address Line2	N/A
	Output	25	Rental Location City Name	City	N/A
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	3	Rental Location State / Province Code	State	N/A
	Output	20	Rental Location Telephone Number	Telephone Number	N/A
Add the current location to my list of favorites	Check box	1	Add to Favorites Indicator	NOT STORED	Should default to false (unchecked). If checked, the system should add the current rental branch location to the favorites list in the user profile on the basis of the reservation. The branch location address will appear in the combo box on subsequent attempts until a description
Favorite Locations	Combo Box	30	Favorite Location	location name	The combo list should include the descriptions of each favorite location as identified in the user profile. This field should default to '-Select a Favorite Location-'. If a favorite location is selected, the application will instantly retrieve the favorite location and refresh the reservation screen.
Note to Enterprise	Text	400	Authorization Message	message text	N/A
Note to Self Only	Text	400	Diary Note	diary note text	The system will store the text entered into this field in the ARMS Web database with the authorization, but the message will not be sent to the branch.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 More Locations

The **More Locations** screen function allows the USER to select a different rental branch location using the Find Rental Location use case. Invoking this screen function will launch the USER into the Find a Rental Location use case.

2.3.3.1.1 The More Locations screen function is invoked through a button click.

2.3.3.2 Additional Charges

The **Additional Charges** screen function allows the USER to add, view, and modify any additional charges that they might authorize for a rental reservation (e.g., CDW). Invoking this screen function will launch the USER into the Additional Charges use case.

2.3.3.2.1 The Additi nal Charges screen function is invoked through a button click.

2.3.3.3 View Car Class

The View Car Class screen function allows the USER to view and select a Rental Car Class to apply to a reservation. Invoking this screen function will launch the USER into the View Car Classes use case.

2.3.3.3.1 The View Car Class screen function is invoked through a button click.

2.3.3.4 Select a Favorite Location

The Select a Favorite Location screen function allows the USER to change the rental branch location to one of the rental branch locations identified as a 'favorites' in their USER profile.

2.3.3.4.1 The Select a Favorite Location is invoked by selecting a value from the Favorite Locations drop-down list. The system should automatically retrieve the favorite location (and rates) when the value of this field is selected.

2.3.3.5 Confirm Reservation

The Confirm Reservation screen function allows the USER to submit all reservation information to the ARMS Web system, which will create a new reservation.

2.3.3.5.1 The Confirm Reservation screen function is invoked either through a button click or by an Enter keystroke.

2.3.3.5.2 If the information submitted to the ARMS Web application is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

2.3.3.6 Cancel

The Cancel Reservation screen function will allow the USER to leave the screen and return to their ARMS Web start page. No information is saved and no reservation is created.

2.3.3.6.1 The Cancel screen function is invoked through a button click.

ARMS Redesign Project - Release 2.0
Create Reservation

Issue: v1.4
Issue Date: 9/22/2000

2.4 Reservation Confirmation Screen

The *Reservation Confirmation* screen provides the user interface and functions to support Step 16 of the Basic Flow. This provides the USER with confirmation feedback on successful submission of the reservation.

2.4.1 Screen Layout (ARMS Web 3.0)

Enterprise Rent-A-Car
Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Self

You just authorized 3 days at \$29.39/day for Hanks, Tom

Confirmation:
CUSTOMER FILE

☐ Don't show me this confirmation page again.

This confirmation page can be removed.
You can remove this page from your future transactions with ARMS.

How it works:
Simply check the "Don't show me this confirmation again" checkbox and click the "Next Action Item" button.

What will happen next?
When you complete an action item, the system will immediately show you the next action item on your list for your process. The confirmation will continue to appear. It will provide information about your last transaction as well as the ability to make any changes to that transaction.

Should you check the "Don't show me this confirmation page again" box, this page will never be shown to you again in the future.

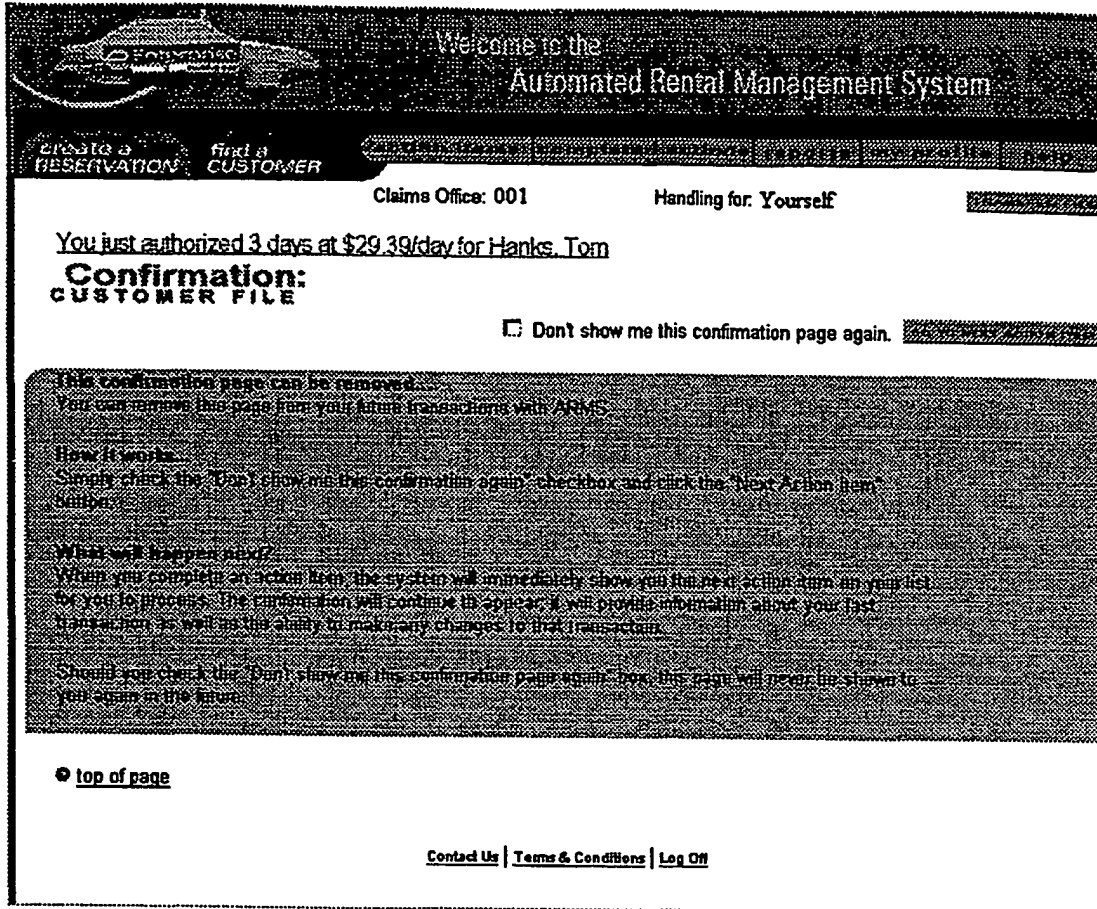
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ARMS Redesign Project - Release 2.0
Create Reservation

Issue: v1.4
Issue Date: 9/22/2000

(Insurance User)



**Welcome to the
Automated Rental Management System**

[Create a RESERVATION](#) [Find a CUSTOMER](#) [Manage my reservation](#) [My account](#) [Help](#)

Claims Office: 001 Handling for: Yourself

You just authorized 3 days at \$29.39/day for Hanks, Tom

**Confirmation:
CUSTOMER FILE**

☐ Don't show me this confirmation page again.

This confirmation page can be removed.
You can remove this page from your future transactions with ARMS.

How it works:
Simply check the "Don't show me this confirmation again" checkbox and click the "Next Action Item" button.

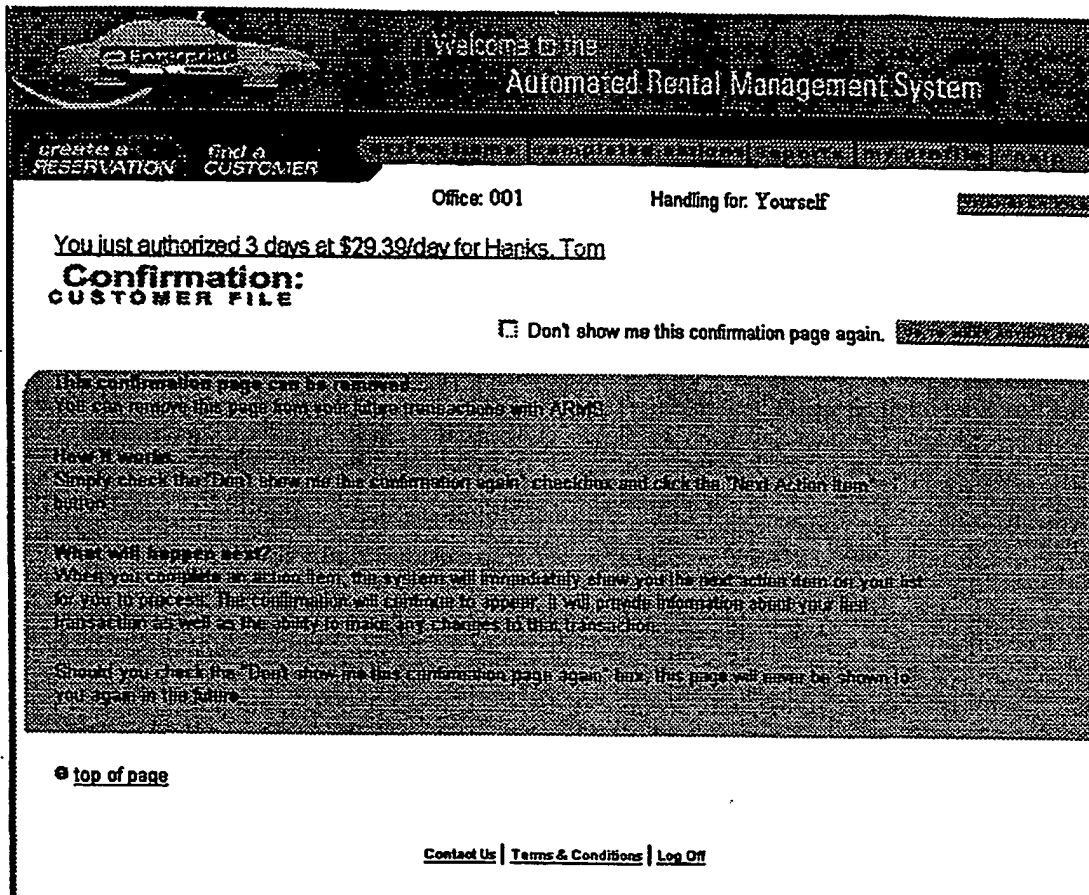
What will happen next?
When you complete an action item, the system will immediately show you the next action item on your list for you to process. The confirmation will continue to appear. It will provide information about your last transaction as well as the ability to make any changes to that transaction.

Should you check the "Don't show me this confirmation page again" box, this page will never be shown to you again in the future.

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(Fleet/Dealership/Corporate User)



The screenshot displays a web browser window with a dark header. On the left is the Enterprise Rent-A-Car logo. The header text reads "Welcome to the Automated Rental Management System". Below the header is a navigation bar with buttons: "create a RESERVATION", "find a CUSTOMER", "cancel a reservation", "print a reservation", "view a reservation", and "next action item". The main content area shows "Office: 001" and "Handling for: Yourself". A confirmation message states: "You just authorized 3 days at \$29.39/day for Hanks, Tom". Below this is a "Confirmation: CUSTOMER FILE" section with a checkbox labeled "Don't show me this confirmation page again." which is currently unchecked. A large grey box contains instructions on how to remove the confirmation page and what will happen next. At the bottom of the page is a "top of page" link and a footer with "Contact Us", "Terms & Conditions", and "Log Off" links.

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER cancel a reservation print a reservation view a reservation next action item

Office: 001 Handling for: Yourself

You just authorized 3 days at \$29.39/day for Hanks, Tom

Confirmation:
CUSTOMER FILE

☐ Don't show me this confirmation page again.

This confirmation page can be removed.
You can remove this page from your future transactions with ARMS.

How it works:
Simply check the "Don't show me this confirmation again" checkbox and click the "Next Action Item" button.

What will happen next?
When you complete an action item, the system will immediately show you the next action item on your list for you to process. This confirmation will continue to appear. It will provide information about your last transaction as well as the ability to make any changes to this transaction.

Should you check the "Don't show me this confirmation page again" box, this page will never be shown to you again in the future.

[top of page](#)

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ARMS Redesign Project - Release 2.0

Create Reservation

Issue: v1.4

Issue Date: 9/22/2000

2.4.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Office	Output	10	Office Location	external organization abbreviated name	
Handling for	Output	35	Handling for	First Name + Last Name	
	Output	150	Confirmation Statement	Authorized Days + Authorized Rate + Renter Last Name + Renter First Name	The screen should provide a statement that reads 'You just authorized' + Authorized Days + 'days at' + Authorized Rate/Policy Limits + '/day for' + Renter Last Name + ', ' + Renter First Name
Don't show me this confirmation page again	Check box	1	Delete confirmation page		If checked, the system should not show this page again. Instead the system will provide the confirmation statement (above) in the feedback section of the page that the user is returned to (the area of the EVERY page reserved for feedback, error messages, etc.)

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Return to Home Page

The **Return to Home Page** screen function will allow the USER to return to their home page from the reservation confirmation screen.

2.4.3.1.1 The **Return to Home Page** screen function is invoked through either a button click or an **Enter** keystroke.

2.4.3.2 Change Reservation

The **Change Reservation** screen function will allow the USER to go back into the Quick Reservation or Detailed Reservation screen and change any errors.

2.4.3.2.1 The **Change Reservation** screen function is invoked by clicking on the feedback hyperlink (e.g., You just authorized 3 days at \$29.39/day for Tom Hanks).

Enterprise Rent-A-Car

ARMS/Web 3.0 Functional Design Specification Find a Rental Location

Version 1:3

Last Saved: 9/26/00 1:53 PM

ARMS Redesign Project – Release 3.0
Find a Rental Location

Issue: 1.3
Issue Date: 9/26/00

Revision History

Date	Issue	Description	Author
2000-03-16	0.1	Initial draft published to the design team for QA	Tom Davies; Sean O'Donnell
2000-03-21	0.2	Revisions recommended by the design team were incorporated into the document.	Sean O'Donnell
2000-03-24	0.3	Revisions to the document were made to reflect the changes made subsequent to cross-team QA process results.	Sean O'Donnell
2000-05-08	0.5	Revisions from the initial management review session were incorporated into the document.	Sean O'Donnell
2000-05-24	0.6	Revisions from the Iteration 2 cross team review process were incorporated into the document.	Sean O'Donnell
2000-05-30	0.7	Added data field information from DATA_FIELDS database	Cindy Bastean
2000-06-05	1.0	Version 1.0 published to the build team.	Sean O'Donnell
2000-07-18	1.1	Updated to reflect changes made through discovery in initial builds, screen redesign, and additional business requirement definition.	Sean O'Donnell
2000-08-15	1.2	Updated with changes and revisions per the recommendation of the business leads and technical teams.	Sean O'Donnell
2000-09-26	1.3	Changes made based on feedback provided by business leads with respect to the future state of Release 3.0.	Amanda Banta, Aaron Foster, Mike Slater, Tim Weinstock

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Find a Rental Location

1. Find a Rental Location Use Case

1.1 Application Overview

The following is a document used to illustrate the process of finding and selecting an alternate rental location for a reservation created using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes the process of finding and selecting an alternate rental location for a reservation created in the ARMS/Web system. The USER will have the ability to select the location search criteria they want to use (i.e. phone number or postal code), select the rental company and select to either review a list of nearby rental company locations or have the system automatically determine a rental company location based on the location search criteria¹. This use case provides the mechanism to return rental company location information, including address, rental company, and phone number to create a new reservation or define a favorite location.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to find and select a rental location for creating a reservation. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the rental administrator would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **LOCATOR** – The LOCATOR system will determine the nearest rental branch location(s) based on the search criteria provided in this use case.
- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to retrieve the information regarding the rental company.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 Pre-Conditions

- The USER must be logged on to the ARMS/Web system.
- The USER must be creating a reservation or defining a favorite location.

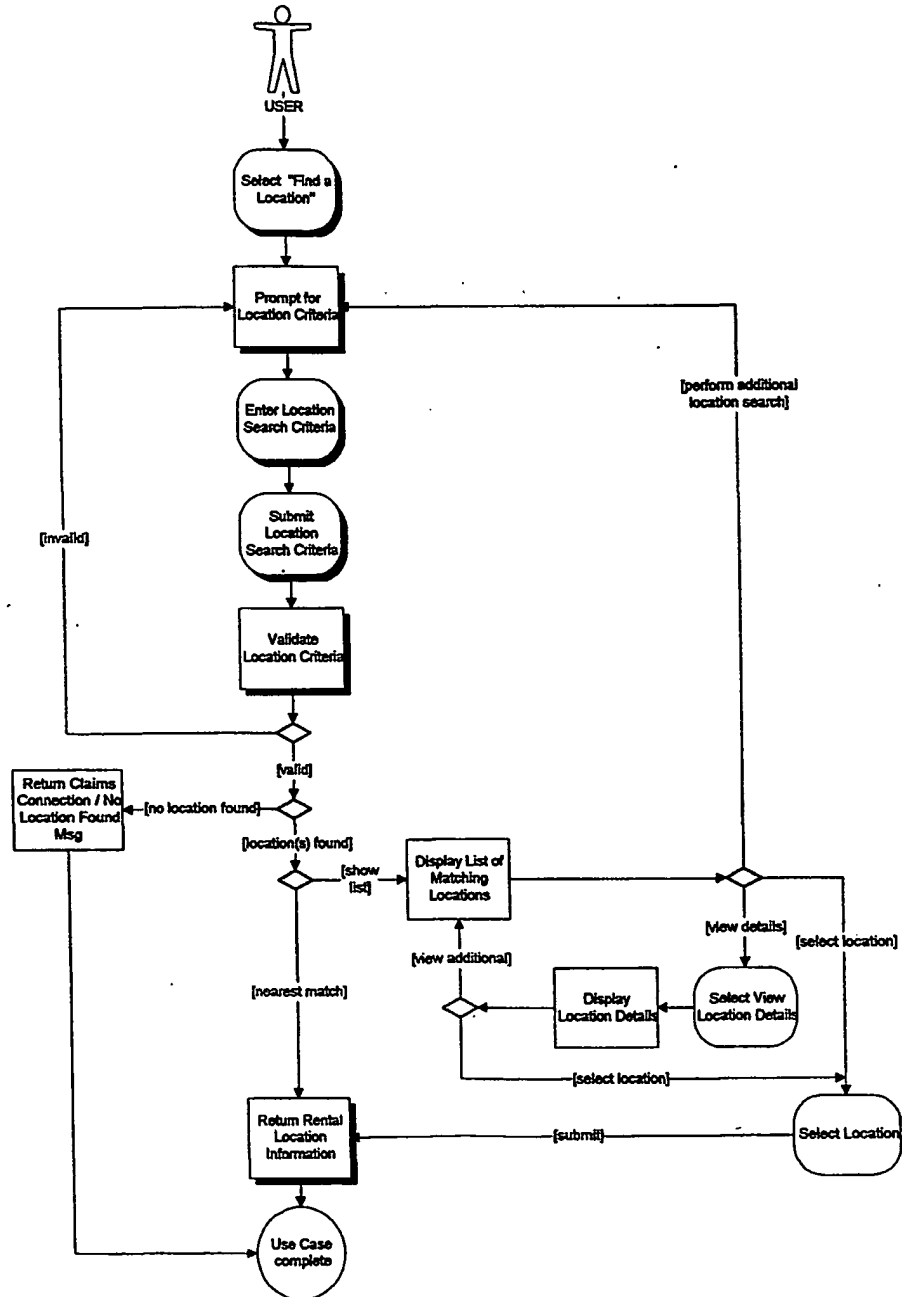
1.5 Flow of Events

The Flow of Events includes all steps necessary to select rental location search criteria and retrieve an alternate rental branch location(s).

¹ The USER will also have the ability to select an alternate location by using the 'Favorite Locations' functionality built into the Create Reservation screens.

1.5.1 Activity Diagram

Find Rental Location Use Case Activity Diagram



1.5.2 Basic Flow

The **Basic Flow** of the Find a Rental Location use case includes all of the required steps for the USER to select and input search criteria to find an alternate rental location. The USER will have the ability to view detailed information about a rental branch, and select a rental branch location to apply to a new reservation.

1. The USER selects to find an alternate rental location.
2. The system will prompt the USER for pick up location search criteria (also referred to as 'where needed' search criteria). This allows the USER to input a telephone number, city, or postal code to find a rental branch (or branches) that accepts ARMS/Web reservations in a given area². The USER may also narrow the search by selecting a particular rental company along with the location search criteria. The USER will be given the option to view a list of rental branch locations matching the search criteria, or to have the ARMS/Web system automatically select the rental branch considered the Nearest Match.
3. The USER enters the required search criteria.
4. The USER submits the rental branch location search criteria.
5. The system will validate the rental branch location search criteria.
6. The system will retrieve/return a rental branch location³ (based on USER search/selection criteria) to be used by the Create Reservation use case⁴. The rental branch location information for the selected branch on the Create Reservation screens will be automatically populated with the list below for the current Create Reservation transaction.
 - Branch name⁵
 - Address
 - Telephone number
 - Rates
7. The use case is complete.

² Rental branch locations have the ability to opt out of accepting ARMS/Web reservations.

³ The requirements for retrieving a rental branch location can be found on page 5 of this document (Section 1.7.1 Requirements for Finding Rental Location).

⁴ This use case is also used to define favorite locations from the 'My Profile' use case. The location will be returned to the 'My Profile' use case when the use case is entered from a 'My Profile' screen

⁵ The Branch name has been included for future usability purposes (e.g., Network Allocation).

1.5.3 *Alternative Flows*

1.5.3.1 *Search Criteria Entered is Invalid*

If the USER enters an invalid Postal Code or Phone Number as location search criteria, an error message should be displayed to the USER and the USER should be forced back into Step 2 of the Basic Flow. If the error is specific to a data field, the field should be highlighted and the error described.

1.5.3.1.1 It will be considered invalid if the 'where needed' search criteria is a telephone number and the first three digits (i.e., area code) meet the criteria below:

- 0XX
- LXX
- The second and third digits are equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

1.5.3.1.2 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number that does not consist of 10 digits.

1.5.3.1.3 It will be considered invalid if the 'where needed' search criteria is a U.S. postal code that does not consist of 5 or 9 digits.

1.5.3.1.4 It will be considered invalid if the 'where needed' search criteria is a Canadian postal code that does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is any digit 0 through 9.

1.5.3.2 *No Rental Branch Locations Found*

If the system cannot determine a rental branch location based on the search criteria entered by the USER, Claims Connection will be returned as the location and the use case will end. Please refer to section 1.7.1 Requirements for Finding Rental Location on beginning on page 5 of this functional specification for handling of this situation.

1.5.3.3 *View a List of Rental Branch Locations*

If the USER opts to view a list of matching rental locations, the list of matching locations will be displayed after Step 5 of the Basic Flow. The USER will have the ability to select one of these locations, view more detail about the locations (i.e., maps, hours of operation), or perform another location search by entering new search criteria.

1.5.3.3.1 If the USER requests additional detail on a specific rental branch in the View a List of Rental Branch Locations Alternate Flow, the system should display a screen with the selected branch's additional information (Rental Company, Branch name, Addresses, telephone/fax numbers, Map to the rental branch location, Hours of operation). The USER should either select the location from this screen (and be returned to Step 6 of the Basic Flow), or be returned to the list of matching locations by closing/continuing from this screen.

1.5.3.3.2 If the USER wishes to perform another rental branch location search in the View a List of Rental Branch Locations Alternate Flow, the system should return the USER to Step 2 of the Basic Flow.

1.5.3.4 Use Case Cancellation

The USER should be capable of leaving the use case at any time.

1.6 Post-Conditions

- If successful, a rental branch location will have been determined and returned to the Create Reservation use case.
- If unsuccessful, the system state remains unchanged.

1.7 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.7.1 Requirements for Finding Rental Location

Below are the requirements for finding a rental location in the ARMS/Web system. ARMS/Web will resolve a rental location and pass the location to ARMS for routing (which is a deviation from current state handling). These requirements were derived from the current state business requirements for the ARMS locator system.

1.7.1.1 ARMS/Web will always return a rental branch location for a reservation. For all ARMS/Web reservations, the following rules for finding a rental location apply:

1.7.1.1.1 For United States locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest branch (or branches) that accepts ARMS reservations. If the USER selects to review a list of rental branch locations, an array of rental branch locations meeting these criteria should be returned.

1.7.1.1.2 For Canadian locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest open branch (or branches) that accepts ARMS reservations. If no open branches are found, the closest branch (or branches) that accepts ARMS reservations should be returned. If the USER selects to review a list of rental branch locations, an array of rental branch locations meeting these criteria should be returned.

1.7.1.2 When the rental branch location is determined, the system will retrieve the group/branch number, name, shipping address, and telephone number of the rental branch location and present them to the USER on the Create Reservation screen(s).

1.7.1.3 The system will only display Claims Connection (7680) as the location (with no rates) when no location can be found within the 50-mile radius. If Claims Connection is displayed, a message should be included to indicate that no rental branch location was found within a 50-mile radius of the search criteria, and Claims Connection will ensure that the reservation is handled appropriately.

ARMS Redesign Project – Release 3.0

Issue: 1.3

Find a Rental Location

Issue Date: 9/26/00

1.7.2 Maintenance of Source Systems

This use case requires that several existing AS/400 databases be used to query for information:

- Locator Database
- Office Information Database

The use case requires that the information in these databases be kept current and it is assumed that the group responsible for maintaining these databases will continue to do so in the future.

1.8 Extension Points

None.

ARMS Redesign Project – Release 3.0

Issue: 1.3

Find a Rental Location

Issue Date: 9/26/00

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Location Search Criteria Screen

This screen allows the USER to select/input the search criteria they want to use to find a rental location. This screen supports Steps 2 and 3 of the Basic Flow.

2.1.1 Screen Layout

(ARMS/Web 2.0)

(ARMS/Web 3.0)

2.1.2 Search for Rental Location

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Country	Combo box	14	Country	country code	This list should consist of United States and Canada. This will expand in future releases. The selection will default to the home country of the USER as defined in the USER profile.
	Input Text	20	Where Needed Value	Where Needed Value	
Rental Company	Combo box	20	Rental Company		This is a list of all the rental companies that are participating.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Postal/Zip Code	Radio Button	1	Postal/Zip Code Button	NOT STORED	
Telephone	Radio Button	1	Telephone Button	NOT STORED	This should be the default radio button selection.
City	Radio Button	1	City Radio Button	NOT STORED	
Automatically select the nearest office	Checkbox	1	Nearest Match Selection		This checkbox should default to checked.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Next

The Next screen function will allow the USER to submit the information on the *Location Search Criteria* screen and initiate the search for matching locations

2.1.3.1.1 The Next screen function is launched through either a button click or by using the Enter keystroke.

2.1.3.1.2 If the information submitted to the ARMS/Web system is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

2.2 Matching Location Screen

This screen allows the USER to review/select a rental location based on the search criteria entered on the *Location Search Criteria* screen. The screen will present 5 matching records at a time to the USER. The USER is given the option of viewing additional detail on a location or entering new search criteria. If there are more locations selected by the search, the USER will view the next locations (up to 5). This screen supports Step 4 of the Basic Flow.

2.2.1 Screen Layout

(ARMS/Web 2.0)

Choose a Location

All cars must be picked up and dropped off at the same location.

Please select a location.

10018 NEW HALLS FERRY RD	10	SANITLOUS	IND	>
11111 LIME BLVD	10	GREENE COEUR	IND	>
22015 BRENTWOOD BLVD	31	SANITLOUS	IND	>
11111 LIME BLVD	10	SANITLOUS	IND	>
10018 NEW HALLS FERRY RD	53	CANTOLOS	IND	>

1 of 5 of 10 | Page 5 of 10

Search for **United States** Location

Postal Code: **631**

Enter information for the location

11111 LIME BLVD

(ARMS/Web 3.0)

Choose a Location

All cars must be picked-up and dropped-off at the same location.

Please select a location:

<input type="radio"/>	10528 NEW HALLS FERRY RD	ENTERPRISE RENT-A-CAR	10	SAINT LOUIS	MO	>
<input type="radio"/>	11830 OLIVE BLVD	CAR TEMPS	16	CREVE COEUR	MO	>
<input type="radio"/>	2229 S BRENTWOOD BLVD	ENTERPRISE RENT-A-CAR	21	SAINT LOUIS	MO	>
<input checked="" type="radio"/>	2150 S HANLEY RD	HLE RENT-A-CAR	23	SAINT LOUIS	MO	>
<input type="radio"/>	3701 LEMAY FERRY RD	RENT-A-CRECK	50	SAINT LOUIS	MO	>

< Previous 5 of 13 Next 5 of 13 >

Search for Any **United States** Location

Rental Company **Select All**

☒ Postal Zip Code **631**

☐ Telephone

☐ City

Enter information for the area in which you'd like to rent.

2.2.2 Screen Field Definition

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Radio Button	1	Selector Radio Button		A radio button should be presented for every rental branch location record in the list. Only one radio button may be selected. The rental branch location that is the shortest distance from the search criteria entered should be the default.
Location	Output	30	Rental Location Address	Address Line	A location should be presented for every rental branch location record in the list.
Rental Company	Output	30	Rental Company name		The name of the rental company that is available from the search criteria.
Miles	Output	4	Miles from Search Criteria		Miles from search criteria should be presented for every rental branch location record in the list.

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
City	Output	18	Rental Location City Name	City	A city should be presented for every rental branch location record in the list.
State/Province	Output	2	Rental Location State/Province Code	State	A state/province should be presented for every rental branch location record in the list.
Country	Drop Down	14	Country	NOT STORED	This list should consist of United States and Canada. This will expand in future releases. The selection will default to the home country of the USER as defined in the USER profile.
	Input Text	12	Where Needed Value	Where Needed Value	
Rental Company	Combo box	20	Rental Company		This is a list of all the rental companies that are participating.
Postal/Zip Code	Radio Button	1	Postal/Zip Code Button	NOT STORED	
Telephone	Radio Button	1	Telephone Button	NOT STORED	This should be the default radio button selection.
City	Radio Button	1	City Radio Button	NOT STORED	
Automatically select the nearest office	Checkbox	1	Nearest Match Selection	NOT STORED	This should default to checked.

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 Select this Location

The **Select this Location** screen function will submit the selected rental branch location in the Rental Location Information Container to the ARMS/Web system, to be used by the **Create Reservation** use case.

2.2.3.1.1 The **Select this Location** screen function is launched through either a button click or by using the **Enter** keystroke.

2.2.3.2 Next X of Y

The **Next X of Y** screen function will allow the USER to view the next five rental locations (unless less than five records exist) that match the search criteria. For example, if a total of 8 locations were returned as part of the search, this screen function would be presented as **Next 3 of 8**

2.2.3.2.1 The **Next X of Y** screen function is launched through a button click.

2.2.3.2.2 The **Next X of Y** screen function should not be presented if 5 or fewer records

are retrieved.

2.2.3.2.3 The Next X of Y screen function should have the X values replaced by the number of records remaining to view (up to five) in this search.

2.2.3.2.4 The Next X of Y screen function should have the Y value replaced by the number of total records returned in the search.

2.2.3.3 Previous 5 of Y

The Previous 5 of Y screen function will allow the USER to view the previous five rental locations that matched the search criteria (and were previously reviewed).

2.2.3.3.1 The Previous 5 of Y screen function is launched through a button click.

2.2.3.3.2 The Previous 5 of Y screen function should not be presented on the initial search results screen. The Previous 5 of Y screen function should only be available if the USER has selected the Next X of Y screen function.

2.2.3.3.3 The Previous 5 of Y screen function should have the Y value replaced by the number of total records returned in the search.

2.2.3.4 Details/Map

The Details/Map screen function allows the USER to review additional information about a rental location presented in the list of matching records. Selecting this screen function will open the *Location Details* screen for the rental branch selected.

2.2.3.4.1 The Details/Map screen function is launched through a button click.

2.2.3.4.2 Each rental branch location presented in the list of matching locations should have it's own Details/Map button.

2.2.3.5 Search Again

The Search Again screen function will allow the USER to submit the Location Search Criteria Container information on the *Matching Location* screen and re-initiate the search for matching locations

2.2.3.5.1 The Search Again screen function is launched through a button click.

2.2.3.5.2 If the information submitted to the ARMS/Web system is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

2.3 Location Details Screen

This screen allows the USER to view additional details for a given rental location. This screen supports the View Location Detail alternate flow.

2.3.1 Screen Layout

(ARMS/Web 2.0)



Choose a Location

Branch Detail

ST LOUIS AIRPORT (ON-SITE) ▶

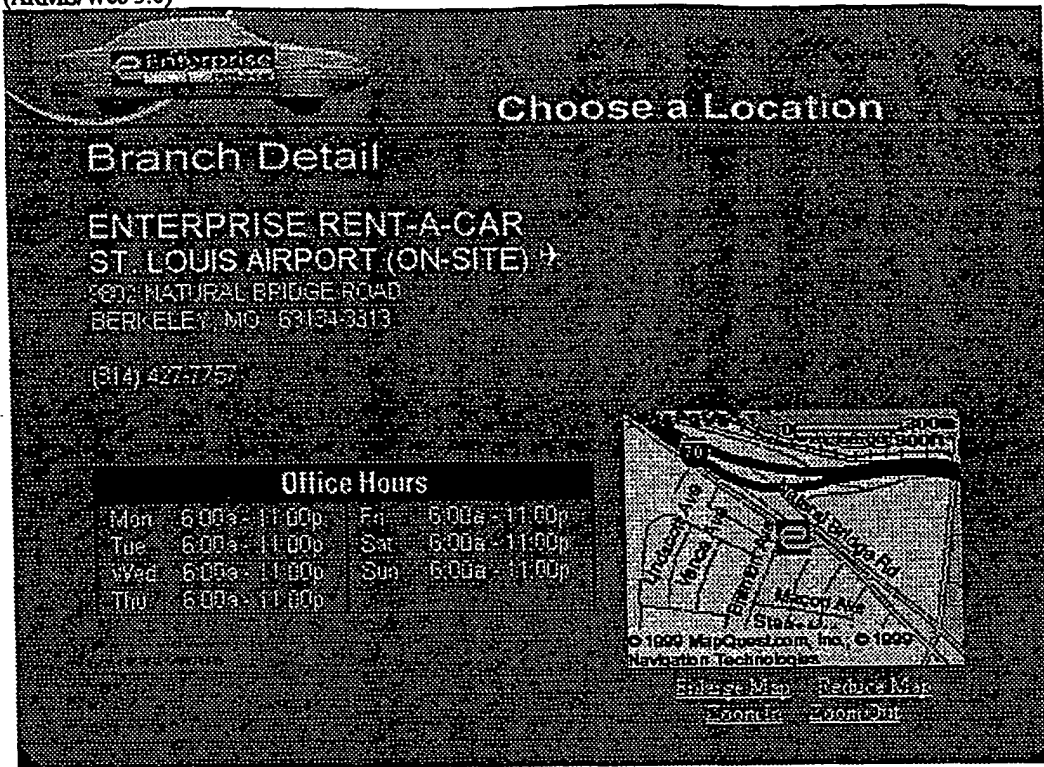
3002 NATURAL BRIDGE ROAD
BERKELEY, CA 94704-2510

(Tel) 424-7757

Office Hours	
Mon 8:00a - 1:00p	Fri 8:00a - 11:00p
Tue 8:00a - 11:00p	Sat 8:00a - 11:00p
Wed 8:00a - 11:00p	Sun 8:00a - 11:00p
Thu 8:00a - 11:00p	

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RENT-A-CAR

(ARMS/Web 3.0)



2.3.2 Screen Field Definition

Screen Label	Type	Field	Screen Field Name	Data Field	Screen Specific Rule
	Output		Rental Location Name	Rental Location	
	Output		Rental Companies Name		
	Output		Rental Location Address	Address Line	
	Output		Rental Location City Name + ", " + Rental Location	State + City + Zip Code	Rental Location City Name + ", " + Rental Location State/Province Code + " " + Rental Location Postal/Zip Code
	Output Text		Rental Location Telephone Number	Telephone Number	

Screen Label	Type	Length	ScreenFieldName	DataField	ScreenSpecificRule
Mon	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Monday' value in the hours of operation array.
Tue	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Tuesday' value in the hours of operation array.
Wed	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Wednesday' value in the hours of operation array.
Thu	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Thursday' value in the hours of operation array.
Fri	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Friday' value in the hours of operation array.
Sat	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Saturday' value in the hours of operation array.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Select this Location

The **Select This Location** screen function will submit the selected rental branch location to the ARMS/Web system, to be used in other parts of the system.

2.3.3.1.1 Clicking on the Select This Location hyperlink launches the Select this Location screen function.

2.3.3.2 Previous

The **Previous** screen function will return the USER to the list of locations that was presented based on the search criteria that were entered.

2.3.3.2.1 Clicking on the Prev button launches the Previous screen function.

2.3.3.3 Enlarge Map

The **Enlarge Map** Screen function will retrieve a larger graphic image of the map to the location. The larger image will be placed in the same screen location of the *Location Details* screen.

2.3.3.3.1 Clicking on the Enlarge Map hyperlink launches the Enlarge Map screen function.

2.3.3.4 Reduce Map

The **Reduce Map** Screen function will retrieve a smaller graphic image of the map to the location. The smaller image will be placed in the same screen location of the *Location Details* screen.

2.3.3.4.1 Clicking on the Reduce Map hyperlink launches the Reduce Map screen function.

2.3.3.5 Zoom In

The **Zoom In** screen function will retrieve a more specific (more detailed) graphic image of the map to the location. The more specific image will be placed in the same screen location of the *Location Details* screen.

2.3.3.5.1 Clicking on the Zoom In hyperlink launches the Zoom In screen function.

2.3.3.6 Zoom Out

The **Zoom Out** screen function will retrieve a more general (less specific) graphic image of the map to the location. The more general image will be placed in the same screen location of the *Location Details* screen.

2.3.3.6.1 Clicking on the Zoom Out hyperlink launches the Zoom Out screen function.

3. Questions and Answers

Issue Number: 307

Question: We have heard from the business that the search by name criteria needs to be better. Today we search by the first three letters of the last name. We need to know what criteria is the preferred method of search to be done.

For example: Do we search the entire last name and first name?

Do we search by the first three letters of the last name and the first letter for the first name?

Do we search by first letter of last name and first letter of first name?

Need the Business Rule.

Status: 12 User Review

Resolution: 4-17-00, Sean O'Donnell - We have spoken to the Rental Redesign folks to find out how they are doing last/first name matching, and they are not planning to search by name in the new rental system (Telephone Number, Driver's License, and SSN only). They were going to have an 'implied wildcard' search by name, but it was taken out in USER review.

Issue Number: 310

Question: Do we want the ARMS/Web to have search available by phone, zip code/postal code, city and state. Current state only allows for phone number searches. Do we want to search other than phone number

For example: Do we want to search by phone number or zip code?

Do we want to search by phone number or zip code or city?

Need Business Rule

Status: Closed - Resolved

Resolution: 3-16-00, Jen Cavanaugh - Talking with Dave Smith. 3-22-00, Issue Mtg, Search by phone # & zip code only.

(SHOULD THE ANSWER BE "SEARCH BY PHONE # AND/OR ZIP CODE?") yes it is and/or could be both or one.

Issue Number: 311

Question: If a daily rental branch is closed, how do we want the system to work? Current state it defaults to Claims Connection. We need clarification on how this should work in the ARMS/Web environment.

3-17-00, Application Team - What do we want to see in the locator, do we want to see just open only or all? If no branch is open do we return to Claims Connection?

Status: Closed - Resolved

Resolution: 3-16-00, Jen Cavanaugh - Stan's team is going to get w/claims Connection to see how this process works after hours. From there we will make some business decisions

3-20-00, Jennifer Cavanaugh - Stan's team needs to research how ARMS & Retail Res Locator works & how they differ. Then we will re-review the question.

3-27-00, Sean - I talked with Trent Tinsley and Kim Devallance on this topic, which was EXTREMELY helpful. If the adjuster selects a closed branch, the system will route the ticket based on the type of service established in the insurance company profile:

Insurance companies that do NOT have 24-hour service, the reservation will be routed to the branch that was selected. The branch will do a callback in the morning when they re-open. Insurance companies that have 24-hour service have their reservations re-routed to Claims Connection (who will do a callback prior to 9p in any time zone unless otherwise specified by an adjuster) if the selected office is not open. This determination is made in the background after the adjuster submits the reservation. Claims connection will re-route the reservation to the appropriate branch when the customer is contacted.

Essentially, the way that location selection is handled today can/should be supported in the future version of ARMS/Web (location selection is implied through the F2 - Rates function of ARMS/400). Please let me know if you have questions with regard to this issue update/resolution.

4-7-00, Issue Mtg, Sean to check with Carl Jensen to see if the locator pulls back open/closed office. Given Sean's update we can close after that, (Don't show to the adjuster that the reservation was sent to claims connection)

Issue Number: 374

Question: In the Create Reservation functional specification, we have stated that the system will pull a location and rates immediately for the USER. The issue arises when we have no location to retrieve, in cases that the 'where needed' search criteria is weak or we don't have a branch within 50 miles of the search area. In the current state, we show Claims Connection as if it were a branch in this situation. This can be somewhat confusing (to see the location on Hanley Road in St. Louis if you are in Delaware). In the future state, we think it may be a good idea to notify the USER that no location was found, and that the reservation would be handled by Claims Connection (see example message below). Any thoughts on this question...

EXAMPLE MESSAGE:

A rental branch could not be found within 50 miles of 555-512-5000. Claims Connection will ensure your reservation is handled immediately. Please call 800-CLAIMS CONNECTION for additional assistance.

Status: Pending

Resolution: 5-8-00, Response from Sean O'Donnell: Dave liked the idea, and so did Kim. Have not heard from Randy on this one, though. Let me know if you need me to follow up, otherwise this will be written in to the specification for Finding a rental location.

Enterprise Rent-A-Car

Functional Design Specification Send Message

Version 1.1

Last Saved: 7/18/00 4:25 PM |

NOTE: Revisions have been turned on within this document to assist readers of previous versions to quickly reference the parts of the functional specification have changed. This can make the document difficult to read, and you may consider accepting all revisions to get an 'easier to read' version of the document. To accept revisions, select Tools → Track Changes → Accept or Reject Changes... from the menu bar. Click 'Accept all' and all changes will be accepted, and the document will be easier to understand.

ARMS Redesign Project - Release 2.0
Send Message

Issue: 1.1
Issue Date:
10/20/007/18/00

Revision History

Date	Issue	Description	Author
2000-03-28	0.1	Initial draft distributed to the design team for review and comment.	Brent Armbruster
2000-03-29	0.2	Design team comments incorporated into the document. Published to the cross-team QA process.	Brent Armbruster; Sean O'Donnell
2000-03-30	0.3	Incorporated comments from the cross-team QA session.	Brent Armbruster
2000-05-05	0.4	Incorporated the comments from the Management Review session, and added detail to the functional specification.	Sean O'Donnell
2000-05-16	0.5	Revisions made from the cross-team QA process.	Sean O'Donnell
2000-05-30	0.6	Added data field information from DATA_FIELDS	Cindy Bastean
2000-06-05	1.0	Version 1.0 published to the build team	Sean O'Donnell
<u>2000-07-18</u>	<u>1.1</u>	<u>Changed to reflect updates to the screens, and modified functionality since the last version.</u>	<u>Sean O'Donnell</u>

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Send Message

1. Send Message Use Case

1.1 Brief Description

This use case describes the process of capturing messages and diary notes associated with a rental reservation/authorization. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization (MESSAGE in this document), or to store the note in the ARMS Web system without sending the message to Enterprise (DIARY NOTE in this document). All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

NOTE: *This is a sub-use case that must be accessed from another use case. For example, a USER may send a message while creating a reservation, maintaining an authorization, or completing an extension.*

1.2 Use Case Actors

The following actors will interact with this use case. All actors are referred to as USER throughout this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to enter and send a message about a reservation/authorization to the rental branch location that is responsible for the reservation/authorization. The ADJUSTER may also use this use case to capture diary notes.
- **PROCESSOR** – The PROCESSOR will use this use case to enter and send a message about a reservation/authorization to either the rental branch location or the ADJUSTER that is responsible for the reservation/authorization.
- **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR will use this use case to send a message on a specific transaction to notify the rental branch location or other user of issues/complications in transmission of the transaction.

1.3 Pre-Conditions

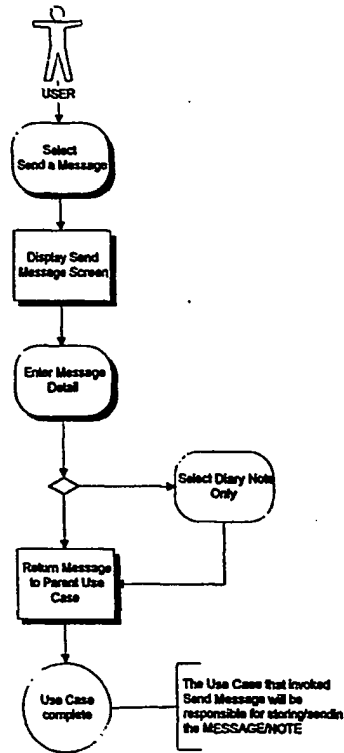
- The USER must be signed-on to the ARMS Web system.
- The USER must have selected an authorization that is in a state that allows MESSAGES or DIARY NOTES.

1.4 Flow of Events

The Flow of Events includes all steps necessary to enter MESSAGES and DIARY NOTES.

1.4.1 Activity Diagram

Send Message Activity Diagram



1.4.2 Basic Flow

The Basic Flow of the Send Message use case includes all of the required steps for the USER to enter a MESSAGE or DIARY NOTE.

1. The USER will indicate that they want to send a MESSAGE for a reservation/authorization.
2. The system will display a screen that will capture the message/note text.
3. The USER will enter the message/note text.
4. The USER returns to the parent use case, and the system stores the text message to be sent at a later time (see Special Requirements).
5. This ends this use case.

1.4.3 Alternative Flows

1.4.3.1 Send Diary Note Only

The USER will have the ability to indicate that the MESSAGE text should be stored as a DIARY NOTE only in Step 3 of the Basic Flow. This text should not be sent to the Enterprise rental branch location handling the reservation/ticket.

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1.4.3.2 Use Case Cancellation

The USER should be capable of leaving the use case at any time.

1.5 Post-Conditions

- If successful, the message/note text will be updated in the ARMS Web database. MESSAGES requested to be sent to the rental branch location are sent to ARMS.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

1.6.1 Submit Message Responsibilities

The parent use case that accessed this function will have the responsibility of submitting the text message to the ARMS Web database. Based on USER input, the parent use case must complete the following action:

- If the USER chose to have the text sent to the rental branch location as a MESSAGE, the text will be written to the ARMS Web database and the MESSAGE will be sent to ARMS. ARMS will forward the text to ECARS for distribution to the appropriate rental branch.
- If the USER chose to save the text as a DIARY NOTE, the text will be written to the ARMS Web database as a DIARY NOTE only.

1.7 Extension Points

None.

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Send Message

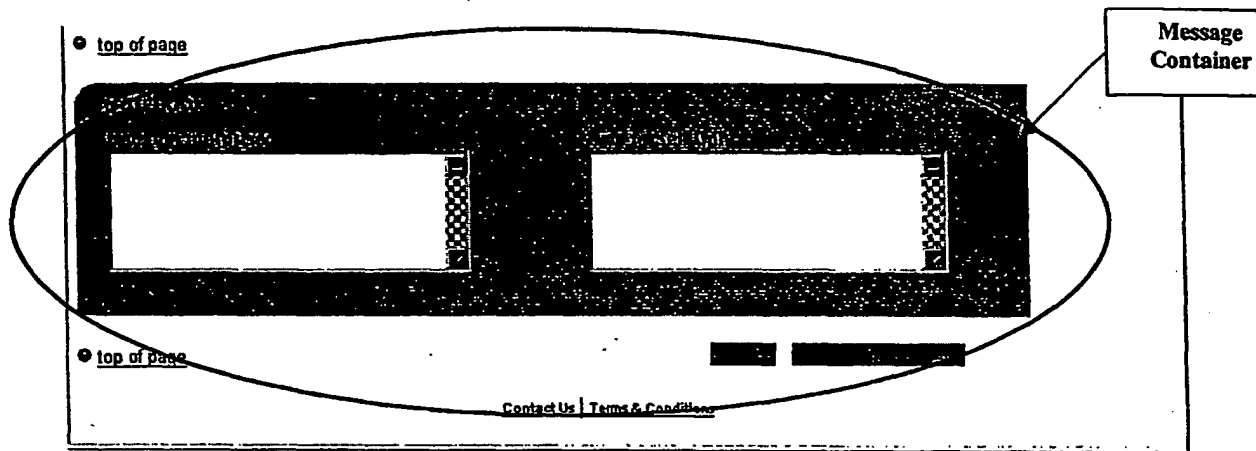
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2. Screen Design

As noted in the Send Message Use Case, the Send Message function will be available on multiple screens throughout the system (e.g., Create Reservation, Extend Rental, Change Authorization). This section provides functional description of the screen container that is used on the multiple screens to support the Send Message use case.

2.1 Message Screen Container

2.1.1 Screen Layout¹



The area of the screen under consideration is the container beginning with the Notebook heading and ending with the ~~Send this message to Enterprise rental branch~~ checkbox. This is an example of how the message container might look on any given screen.

2.1.2 Message Screen Container

Screen Label	Type	Length	ScreenFieldName	DataField	ScreenSpecificRule
Send this message to Enterprise rental branch	Check Box	1	Diary Note Indicator	message occurs indicator	If unchecked, the message will be sent to ARMS to be sent to the rental branch location. If checked, the message will be stored in the ARMS Web database but will NOT be forwarded to ARMS.
Rental NotesNote to Enterprise	Input Text	200	Message Text	message text	Text entered into this field will be sent to the Enterprise rental branch location.
Note to Self Only	Input Text	200	Message Text	Diary text	Text entered into this field will be stored in the ARMS Web database but will not be sent to the Enterprise rental branch location.

¹ This is the screen layout for the Create Reservation screen. The Message screen container is part of this screen, and is shown here for illustrative purposes only.

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2.1.3 Screen Function Definition

The Message screen container will use the functions of the parent screen to have the message sent.

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3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Create Transaction Transmission key

(Office Identifier, Customer Transaction Identifier)

This operation will use the parameters provided to generate and return a Transaction Transmission key.

3.2 Store a Message

(Office Identifier, Customer Transaction Identifier, Send Message Indicator, Message Text)

This operation will add the information entered by the USER to the ARMS Web database.

4.Data Fields

4.1Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1Customer Transaction ID

Entity	AUTHORIZATION EXTENSION
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	AZCUTI
Data Type	CHAR(20)

4.1.2external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)

4.1.3external organization identifier

Entity	OFFICE PROFILE
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)

4.1.4message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)

4.1.5message text

Entity	AUTHORIZATION MESSAGE
Column Name	msg_txt
Label Name	message text:
System Name	MSGTXT
Data Type	CHAR(50)

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5.3. Questions and Answers

Issue Number: 341

Question: Current state ARMS400 allows user to enter maximum of four lines of fifty characters. Current state ARMS has program limitation of ten lines of fifty characters. ARMS Web will be limited by current state ARMS. Should that be the planned maximum for ARMS Web or ??? One idea would be to have the number of lines/characters profiled. Then the size of the message box that is displayed to the user would be limited by this profiled amount.

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - I think ten lines of fifty characters to be entered by any user at a time is more than enough. I don't really for see the need to profile this by company

Issue Number: 342

Question: Current state allows message to be sent on unauthorized requests only if they have not been assigned to an adjuster. How should future state work? If we allow messages on assigned unauthorized requests, we must keep in mind that we are defaulting the Direct-Bill To percent at 100% on all auth. screens. When the adjuster submits the message, they MAY be unintentionally authorizing the request.

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim: we should never send an authorization to the branch if all the adjuster did was key in a message. The message will either appear in ECARS under res notes or callback notes, but should never appear to the branch as an authorization. We not only need to give the adjuster the ability to send a message, but they should be able to change info (such as claim number, claim type, etc) before assigning the request to the adjuster, thereby enabling the adjuster to see the correct info when authorizing or denying a DB. We hear this request a lot from our customers.

Enterprise Rent-A-Car

Functional Design Specification Additional Charges

Version 1.2

Last Saved: 8/15/00 2:45 PM

ARMS Redesign Project - Release 2.0
Additional Charges

Issue: 1.2
Issue Date: 8/15/2000

Revision History

Date	Issue	Description	Author
2000-04-07	0.1	Initial draft published to cross-team QA process	Brent Armbruster; Sean O'Donnell
2000-04-11	0.2	Removed subdocuments. Updated formatting in Data Fields Section	Cindy Bastean
2000-05-01	0.3	Added screen fields to "Additional Charges" screen field table	Cindy Bastean
2000-05-08	0.4	Additional enhancements and changes made to the functional specification to incorporate comments made in the initial review session.	Sean O'Donnell
2000-05-24	0.5	Revisions made as a result of the Iteration 2 cross-team review.	Sean O'Donnell
2000-05-30	0.6	Added data field information from DATA_FIELDS	Cindy Bastean
2000-07-18	1.1	Changes made to the functional specification since the last review session were incorporated into the document.	Sean O'Donnell
2000-08-15	1.2	Added the screen design section to the specification based on the updated screens received from Marketing.	Sean O'Donnell

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ARMS Redesign Project - Release 2.0
Additional Charges

Issue: 1.2
Issue Date: 8/15/2000

Additional Charges

1. Additional Charges Use Case

1.1 Brief Description

The Additional Charges use case will allow the USER to view, add, or modify/remove any additional charges that may be associated with a rental authorization. Additional Charges such as Collision/Damage Waiver (CDW), Mileage Charge, or any other rental related charge could be authorized by a USER through this function.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to view, add, or modify any additional charges that are associated with a rental authorization.

1.3 Pre-Conditions

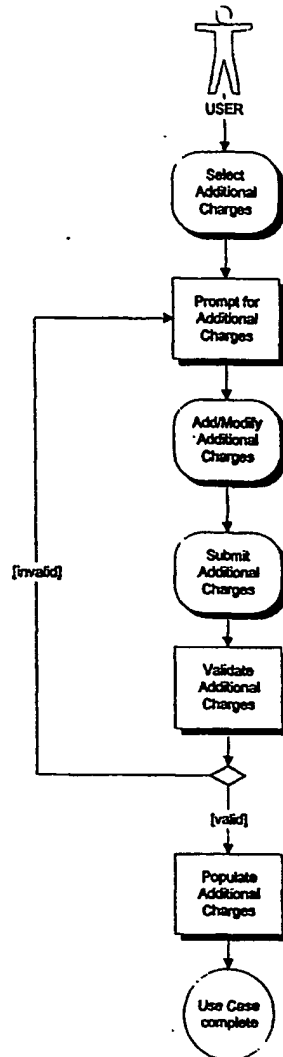
- The USER must be signed-on to the ARMS Web system.
- The USER must have a reservation or open ticket selected (active).

1.4 Flow of Events

The Flow of Events will include the necessary steps to view, add and modify additional charges associated with a rental authorization.

1.4.1 Activity Diagram

Additional Charges Activity Diagram



1.4.2 Basic Flow

The **Basic Flow** of the Additional Charges use case includes all of the required steps to view, add, or modify Additional Charges as part of an authorization.

1. The **USER** will select Additional Charges for the active reservation or open ticket.
2. The system will prompt the **USER** to add, modify or remove Additional Charges.
3. The **USER** will view, add, or modify Additional Charges that will be authorized.
4. The **USER** will submit the Additional Charges to the system.
5. The system will validate the Additional Charges entered by the **USER**.

6. The system will return the USER to the active reservation or open ticket and populate Additional Charges¹.
7. This ends this use case.

1.4.3 Alternative Flows

1.4.3.1 Additional Charges Invalid

If the Additional Charges entered by the USER are invalid, the system should present an error message to the USER and force the USER back into Step 2 of the Basic Flow. The system will declare additional charges invalid in the following circumstances:

1.4.3.1.1 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is greater than \$999.99.

1.4.3.1.2 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is less than \$0.

1.4.3.1.3 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is greater than 100%.

1.4.3.1.4 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is less than 0%.

1.5 Post-Conditions

- If successful, the Additional Charges that were added or modified will be returned to the active reservation or open ticket.
- If unsuccessful, no Additional Charges will be added to the active reservation or open ticket.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Submit Additional Charges Responsibilities

The parent use case that accessed this function will have the responsibility of submitting the additional charges to the ARMS Web database. Any additional charges returned to a parent use case should be reflected on the screen within that use case. For example, if additional charges were being added as part of the Create Reservation process, the Create Reservation screens should have some indication that additional charges have been added.

¹ The Additional Charges should not be submitted to the ARMS Web database until the USER submits the changes on the active reservation or open ticket.

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Additional Charges

Issue Date: 8/15/2000

1.6.2 Additional Charges Descriptions

Below are the current additional charge descriptions used in the ARMS/400 system in the current state:

- DAMAGE WAIVER
- PAI
- MILEAGE CHARGE
- HOURLY
- DAILY
- WEEKLY
- MONTHLY
- SPECIAL
- DROP CHARGE
- MISC CHARGES
- SLP
- UNDERAGE DRIVER
- BABY CAR SEAT
- SKI RACK

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Additional Charges

This screen will allow the user to view, add, modify or remove additional charges associated with a reservation/authorization.

2.1.1 Screen Layout

2.1.2 Screen Field Definition

Screen Label	Type	Length	ScreenFieldName	DataField	ScreenSpecificRule
CDW (Collision Damage Waiver)	Check Box	1	CDW (Collision Damage Waiver)		
PAI (Personal Accident Insurance)	Check Box	1	PAI (Personal Accident Insurance)		
Underage Driver	Check Box	1	Underage Driver		
Drop Charge	Check Box	1	Drop Charge		
Mileage Charge	Check Box	1	Mileage Charge		
Misc. Charge	Check Box	1	Misc. Charge Check Box		
Create Charge Type	Text Box	15	Additional Charge Description		A description of the additional surcharge to be authorized.

Amount	Text Box	6	Additional Charge Value		An Amount text box should be included for every check box on the screen.
Type	ComboBox	20	Additional Charge Type		A Type combo box should be included for every check box on the screen. Values include: Dollars per Day (DEFAULT); Dollars per Rental; Percentage of Rental

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Create More Surcharges

The Create More Surcharges screen function will allow the USER to select the hyperlink and have an additional Misc. Charge line added to the screen. For example, the Screen Layout above shows only one Misc. Charge box. If a USER were to click on the Create More Surcharges hyperlink, the screen would refresh and provide the user with two Misc. Charges boxes. The USER is not limited to the number of Misc. Charge boxes that can be added.

2.1.3.1.1 The Create More Surcharges screen function is invoked through clicking a hyperlink.

2.1.3.2 Process

The Process screen function allows the USER to save the additional charges that are being authorized and return to the active reservation or open ticket. The active reservation or open ticket will reflect that additional charges have been added.

2.1.3.2.1 The Process screen function is invoked through a button click or through an Enter keystroke.

2.1.3.3 Previous

The Previous screen function will allow the USER to return to the active reservation or open ticket without saving the updates to additional charges.

2.1.3.3.1 The Previous screen function is invoked through a button click.

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3. Questions and Answers

None.

Enterprise Rent-A-Car

Functional Design Specification Additional Charges

Version 1.2

Last Saved: 8/15/00 2:45 PM

Revision History

Date	Issue	Description	Author
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2000-04-11	0.2	Removed subdocuments. Updated formatting in Data Fields Section	Cindy Bastean
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Additional Charges

1. Additional Charges Use Case

1.1 Brief Description

The Additional Charges use case will allow the USER to view, add, or modify/remove any additional charges that may be associated with a rental authorization. Additional Charges such as Collision/Damage Waiver (CDW), Mileage Charge, or any other rental related charge could be authorized by a USER through this function.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to view, add, or modify any additional charges that are associated with a rental authorization.

1.3 Pre-Conditions

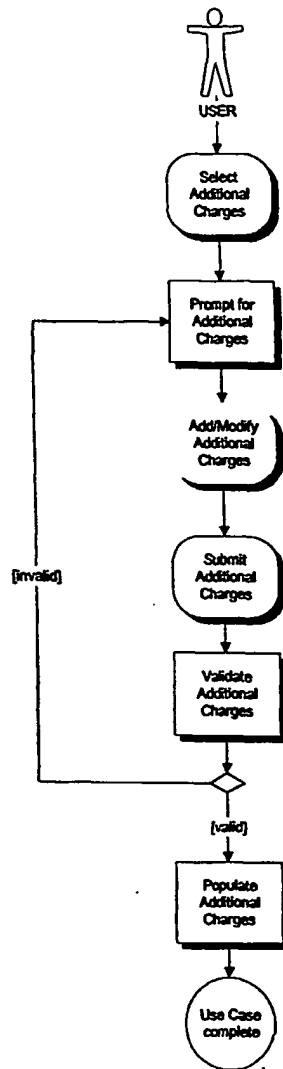
- The USER must be signed-on to the ARMS Web system.
- The USER must have a reservation or open ticket selected (active).

1.4 Flow of Events

The Flow of Events will include the necessary steps to view, add and modify additional charges associated with a rental authorization.

1.4.1 Activity Diagram

Additional Charges Activity Diagram



1.4.2 Basic Flow

The **Basic Flow** of the Additional Charges use case includes all of the required steps to view, add, or modify Additional Charges as part of an authorization.

1. The **USER** will select Additional Charges for the active reservation or open ticket.
2. The system will prompt the **USER** to add, modify or remove Additional Charges.
3. The **USER** will view, add, or modify Additional Charges that will be authorized.
4. The **USER** will submit the Additional Charges to the system.
5. The system will validate the Additional Charges entered by the **USER**.

6. The system will return the USER to the active reservation or open ticket and populate Additional Charges¹.
7. This ends this use case.

1.4.3 *Alternative Flows*

1.4.3.1 *Additional Charges Invalid*

If the Additional Charges entered by the USER are invalid, the system should present an error message to the USER and force the USER back into Step 2 of the Basic Flow. The system will declare additional charges invalid in the following circumstances:

1.4.3.1.1 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is greater than \$999.99.

1.4.3.1.2 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is less than \$0.

1.4.3.1.3 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is greater than 100%.

1.4.3.1.4 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is less than 0%.

1.5 **Post-Conditions**

- If successful, the Additional Charges that were added or modified will be returned to the active reservation or open ticket.
- If unsuccessful, no Additional Charges will be added to the active reservation or open ticket.

1.6 **Special Requirements**

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 *Submit Additional Charges Responsibilities*

The parent use case that accessed this function will have the responsibility of submitting the additional charges to the ARMS Web database. Any additional charges returned to a parent use case should be reflected on the screen within that use case. For example, if additional charges were being added as part of the Create Reservation process, the Create Reservation screens should have some indication that additional charges have been added.

¹ The Additional Charges should not be submitted to the ARMS Web database until the USER submits the changes on the active reservation or open ticket.

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Issue: 1.2

Additional Charges

Issue Date: 8/15/2000

1.6.2 Additional Charges Descriptions

Below are the current additional charge descriptions used in the ARMS/400 system in the current state:

- DAMAGE WAIVER
- PAI
- MILEAGE CHARGE
- HOURLY
- DAILY
- WEEKLY
- MONTHLY
- SPECIAL
- DROP CHARGE
- MISC CHARGES
- SLP
- UNDERAGE DRIVER
- BABY CAR SEAT
- SKI RACK

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Additional Charges

This screen will allow the user to view, add, modify or remove additional charges associated with a reservation/authorization.

2.1.1 Screen Layout

Additional Charges

Add/edit surcharges to the Authorization for Tom Hanks (Claim No. 123456789)

Choose from the surcharges needed:

Surcharge	Amount	Rate
<input checked="" type="checkbox"/> CDW (Collision Damage Waiver)	\$100	\$100
<input type="checkbox"/> PAI (Personal Accident Insurance)	\$100	\$100
<input type="checkbox"/> Underage Driver	\$100	\$100
<input type="checkbox"/> Drop Charge	\$100	\$100
<input type="checkbox"/> Mileage Charge	\$100	\$100

or

Create new surcharge(s):

Surcharge	Amount	Rate
<input checked="" type="checkbox"/> Misc. Charge	\$100	\$100

Create new surcharge(s)

2.1.2 Screen Field Definition

Screen Label	Type	Length	ScreenField Name	DataField	ScreenSpecificRule
CDW (Collision Damage Waiver)	Check Box	1	CDW (Collision Damage Waiver)		
PAI (Personal Accident Insurance)	Check Box	1	PAI (Personal Accident Insurance)		
Underage Driver	Check Box	1	Underage Driver		
Drop Charge	Check Box	1	Drop Charge		
Mileage Charge	Check Box	1	Mileage Charge		
Misc. Charge	Check Box	1	Misc. Charge		
Create Charge Type	Text Box	15	Additional Charge Description		A description of the additional surcharge to be authorized.

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Additional Charges

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Amount	Text Box	6	Additional Charge Value		An Amount text box should be included for every check box on the screen.
Type	ComboBox	20	Additional Charge Type		A Type combo box should be included for every check box on the screen. Values include: Dollars per Day (DEFAULT); Dollars per Rental; Percentage of Rental

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Create More Surcharges

The Create More Surcharges screen function will allow the USER to select the hyperlink and have an additional Misc. Charge line added to the screen. For example, the Screen Layout above shows only one Misc. Charge box. If a USER were to click on the Create More Surcharges hyperlink, the screen would refresh and provide the user with two Misc. Charges boxes. The USER is not limited to the number of Misc. Charge boxes that can be added.

2.1.3.1.1 The Create More Surcharges screen function is invoked through clicking a hyperlink.

2.1.3.2 Process

The Process screen function allows the USER to save the additional charges that are being authorized and return to the active reservation or open ticket. The active reservation or open ticket will reflect that additional charges have been added.

2.1.3.2.1 The Process screen function is invoked through a button click or through an Enter keystroke.

2.1.3.3 Previous

The Previous screen function will allow the USER to return to the active reservation or open ticket without saving the updates to additional charges.

2.1.3.3.1 The Previous screen function is invoked through a button click.

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Issue: 1.2

Additional Charges

Issue Date: 8/15/2000

3. Questions and Answers

None.

Enterprise Rent-A-Car

Functional Design Specification View Car Class

Version 1.2

Last Saved: 8/16/00 3:57 PM

Revision History

Date	Issue	Description	Author
2000-04-07	0.1	Initial draft published to design team for review and comment.	Brent Armbruster, Sean O'Donnell
2000-04-11	0.2	Removed subdocuments. Updated data fields listing to reflect format changes	Cindy Bastean
2000-05-01	0.3	Added screen fields to "Car Class Summary" and "Car Detail Screen" screen field tables	Cindy Bastean
2000-05-08	0.4	Included additional changes, comments and feedback out of the initial review sessions.	Sean O'Donnell
2000-05-30	0.5	Added data field information from DATA_FIELDS	Cindy Bastean

ARMS Redesign Project - Release 2.0
View Car Class

Issue: 1.1
Issue Date: 10/20/00

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View Car Class

1. View Car Class Use Case

1.1 Brief Description

This use case will allow the USER to view examples of automobiles that are part of each Enterprise Car Class. The USER will have the ability to select a car class and have the rate for the car class apply to the reservation/authorization.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to view and/or select the car class that will apply to a reservation.

1.3 Pre-Conditions

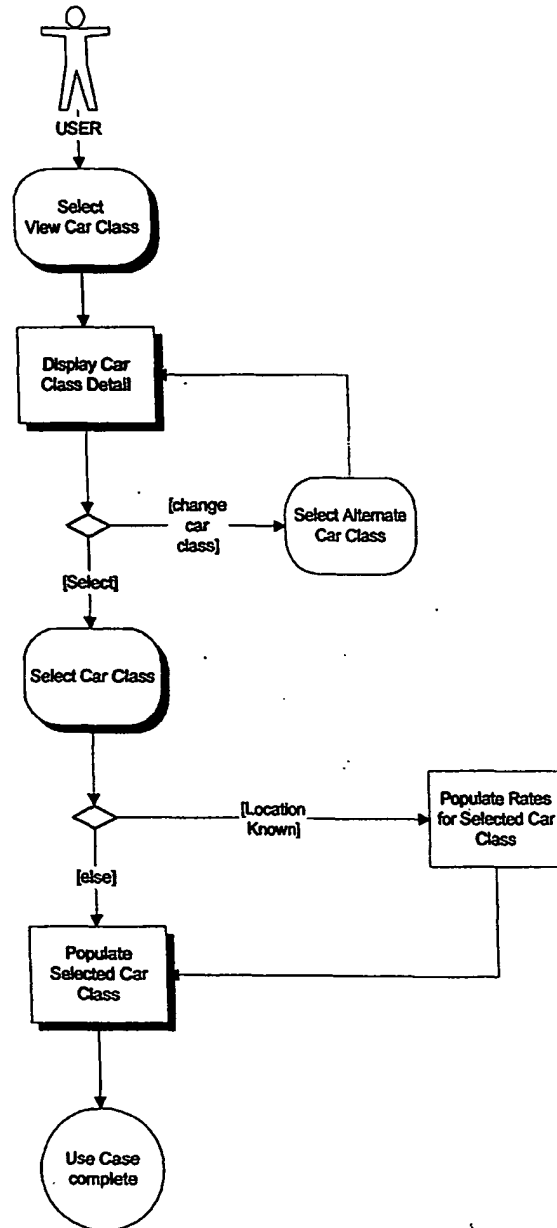
- The USER must be signed-on to the ARMS Web system.
- The USER must have a reservation or open ticket selected.

1.4 Flow of Events

The Flow of Events will include the necessary steps to view and/or select the car class to apply to a rental reservation.

1.4.1 Activity Diagram

View Car Class Activity Diagram



1.4.2 Basic Flow

The Basic Flow of the View Car Class use case includes all of the required steps to view and/or select a car class for a rental reservation. If a car class is selected, it will be used to populate rate information on a rental authorization.

1. The USER will select View Car Class from the active reservation or open ticket.
2. The system will display a car class detail screen. If the USER had previously selected a car class (for example, on the Create Reservation screen), the car class selected will be displayed. If no car class has been selected, the system will display the Standard car class.
3. The USER will select the car class to apply to the reservation or open ticket.
4. The system will return the USER to the active reservation or open ticket and populate car class information based on the car class selected.
5. This ends this use case.

1.4.3 Alternative Flows

1.4.3.1 Select Alternate Car Class

From Step 2 of the Basic Flow, the USER will have the ability to view an alternate car class. The car classes that will be available to view include:

- Economy
- Compact
- Intermediate
- Standard
- Full Size
- Premium

If the USER selects an alternate car class, the system will refresh and present the details of the new car class.

1.4.3.2 Populate Car Class Rates

If a rental branch location has already been selected prior to entering this use case, the selection of a car class will populate the rates that apply to the selected car class on the active reservation or open ticket. This alternate flow returns the USER to Step 4 of the Basic Flow.

1.5 Post-Conditions

- If successful, the selected Car Class will be returned to the active reservation or open ticket.
- If unsuccessful, the system state is unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Modify Car Class Selection Results

The USER may change the results of this use case as part of the active reservation or open ticket.

1.7 Extension Points

None.

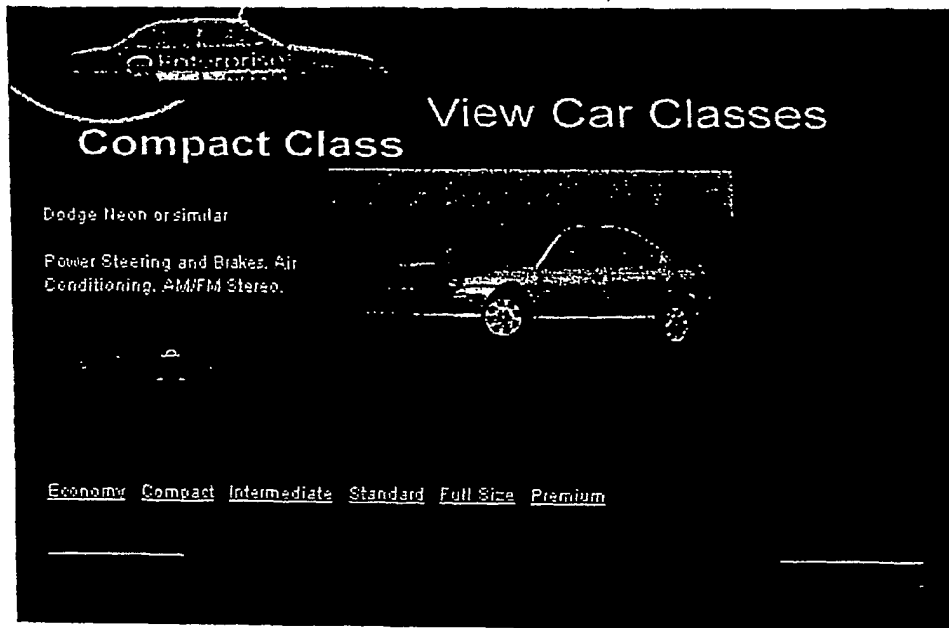
2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Car Class Detail Screen

This screen will allow the USER to view detailed information about Enterprise car classes. The USER will also have the ability to select a car class to apply to a rental reservation / authorization.

2.1.1 Screen Layout



2.1.2 Car Class Details

Screen Label	Type	Length	ScreenFieldName	DataField	ScreenSpecificRule
	Output	20	Car Class Name		This should be the name of the currently selected car class
(Person Image)	Output	2	Car Class Person Capacity		This should provide the average person capacity of the selected car class.
(Luggage Image)	Output	2	Car Class Luggage Capacity		This should provide the average luggage capacity of the selected car class
	Hidden	255	Car Class Image Source		This should provide a picture of an example car within the selected car class.
	Output	120	Car Class Detail Description		This should provide a description of the selected car class.
Economy	Output		Economy Car Class		This should be a hyperlink to the Economy car class detail.

Screen Label	Type	Length	ScreenFieldName	DataField	ScreenSpecificRule
Compact	Output		Compact Car Class		This should be a hyperlink to the Compact car class detail.
Intermediate	Output		Intermediate Car Class		This should be a hyperlink to the Intermediate car class detail.
Standard	Output		Standard Car Class		This should be a hyperlink to the Standard car class detail.
Full Size	Output		Full Size Car Class		This should be a hyperlink to the Full Size car class detail.
Premium	Output		Premium Car Class		This should be a hyperlink to the Premium car class detail.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Select This Car Class

The Continue screen function will allow the USER to select the car class to apply to a reservation.

2.1.3.1.1 The Continue screen function is invoked through either a button click or through an Enter keystroke.

2.1.3.2 Previous

The Previous screen function allows the USER to return to the previous screen.

2.1.3.2.1 The Previous screen function is invoked through a button click.

3. Questions and Answers

None.

Enterprise Rent-A-Car

Functional Design Specification Assign a Request

Version 1.1

Last Saved: 10/17/00 2:24 PM

Revision History

Date	Issue	Description	Author
April 7, 2000	0.1	Initial Draft	Keith Baker
April 11, 2000	0.2	Added fields from Databases	Cindy Bastean / Debi Ealick
April 20, 2000	0.2	Merged subdocuments	Cindy Bastean
April 27, 2000	0.3	Added new screen layouts	Deb Ealick
April 27, 2000	0.4	Removed Application Operations and Data Fields per new Functional Spec Reporting Process Implementation	Cindy Bastean
May 10, 2000	0.5	Included changes from Cross-Team QA	Cindy Bastean
May 15, 2000	0.6	Added screen change to document according to cross-team review	Debi Ealick
June 8, 2000	0.6	Added Data Field Information	Cindy Bastean
July 3, 2000	0.7	Change screen field / data field information	Cindy Bastean
July 13, 2000	0.7	Updated Use Case and Screen Design sections for sign-off	Mike Slater, Brian Weingart, Stanley Schuchat, Deb Ealick, Brent Armbruster, Johnny Sands and Cindy Bastean
August 28, 2000	1.0	Updated Use Case. Changes made based on feedback provided by management reviewers.	Mike Slater
October 3, 2000	1.1	Updated FDS. Changes made based on feedback provided by testing team.	Mike Slater

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Assign a Request

1. Assign a Request Use Case

1.1 Brief Description

This use case describes the process of how a USER will review unassigned authorization request and assign them to an adjuster for further handling.

1.2 Use Case Actors

The following actors will interact with this use case:

- **CLAIMS PROCESSOR** - The CLAIMS PROCESSOR is a USER who can perform this use case to assign a request for further handling.
- **ADJUSTER** - The ADJUSTER is a USER who can receive the assigned request for further handling.

1.3 Pre-Conditions

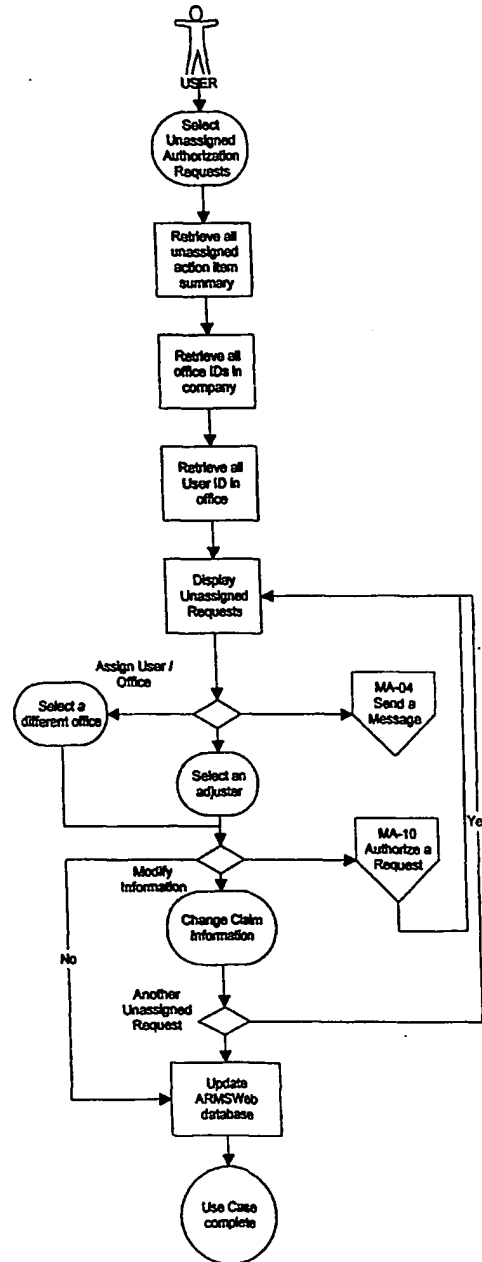
- The USER must be signed-on to the ARMS Web system.
- The USER should be authorized to assign a request.
- If there are unassigned requests present, the USER has selected the link from the Review List Action Items Use Case to enter this use case.

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to “Assign an Action Item”.

1.4.1 Activity Diagram

Assign An Action Item Diagram



1.4.2 Basic Flow

1. The USER selects the unassigned authorizations link.
2. The system retrieves all unassigned request summaries.
3. The system retrieves all OFFICE IDs within ARMS Web.
4. The system retrieves all USER IDs within the OFFICE.
5. The system displays the unassigned authorization summaries with the offices and adjusters.
6. The USER selects an adjuster to assign to the request.
7. The system will update the ARMS Web database.
8. This ends the use case.

1.4.3 Alternative Flows**1.4.3.1 Cancel Use Case**

The USER should be capable of leaving the use case at any point prior to assigning the reservation information to an ADJUSTER.

1.4.3.2 Modify a Request

Before step 6 of the basic flow, the USER should be able to make changes to the authorization.

1.4.3.3 Select a different office

Before step 6 of the basic flow, the USER should be able to select a different office for this authorization request. If a different office has been selected, the user cannot assign the file to a new adjuster. The new office must now assign the file.

1.5 Post-Conditions

If the use case is successful, the system will change the request type from an unassigned authorization request to direct bill. If the user has authority to authorize this request, the system will change the request to Authorized status and assign the adjuster picked in Step 5 of the basic flow.

If the use case is unsuccessful, the system state will remain unchanged.

1.6 Special Requirements

None

1.7 Extension Points**1.7.1 MA-04 Send Message**

The Send Message function will be used to allow the user to capture messages and diary notes associated with a rental reservation/authorization. The USER can elect to have the message sent to the Enterprise rental branch location responsible for the reservation/authorization. The USER may also send a message without assigning the file to an adjuster/office. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.7.2 MA-10 Authorize a Request

The ADJUSTER may decide to enter into the full detail screen of the unassigned request, which would invoke the Authorize a Request case.

1.7.3 MA-17 Cancel Authorization

At any point prior to assigning the file to an ADJUSTER, the USER should have the ability to cancel the authorization. If the authorization is cancelled, the ADJUSTER will be prompted to select a cancellation reason code from a drop down list along with having the option to enter additional comments.

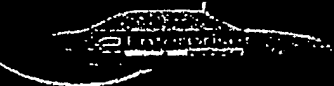
2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Action Items – Unassigned

This screen will allow the USER assign action items to a claims office or an adjuster or the USER may cancel an item. The USER may also change specified information in the Customer File through this screen.

2.1.1 Screen Layout – Action Items - Unassigned



Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

You just approved an Invoice for Crystal, Billy - Total Amount \$536.13

**Action Items:
UNASSIGNED**

Weber, Andrew
28445 Main Ave
Chicago, IL 60622
555-555-1212

DIRECT BILL REQUEST
Claim Number: 754589877
Vehicle Condition:
Claim Type:
Date of Loss:
Note to Enterprise:

1 Assign to Office:
2 Assign Adjuster:
-or-
3 this item

Smith, Joe
28445 Main Ave
Chicago, IL 60622
555-555-1212

DIRECT BILL REQUEST
Claim Number: 754589877
Vehicle Condition:
Claim Type:
Date of Loss:
Note to Enterprise:

1 Assign to Office:
2 Assign Adjuster:
-or-
3 this item

[Contact Us](#) | [Terms & Conditions](#) | [Log Off](#)

2.1.2 Action Items - Unassigned

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	N/A.
	Output	30	Renter's Name	First Name + Last Name	This should be a link. The USER should be able to get to the authorize page from this screen field
	Output	30	Renter's Address	Address Line	
	Output	10	Renter's City	City	
	Output	3	Renter's State	State	
	Output	10	Renter's Zip Code	Zip Code	
	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extensin	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone
Claim Number	Input	30	Claim Number	Insurance Claim Number	N/A.
Vehicle Condition	List Box	15	Loss Type	loss type description	
Claim Type	List Box	15	Claim Type	claim type description	N/A.
Date of Loss:	Input	10	Date of Loss	Date Of Loss	N/A.
Note to Enterprise	Input	30	Message Text	NOTE	N/A.
Assign to office:	List Box	5	Office Id	external organization abbreviated name	
Assign adjuster:	List Box	30	Adjuster Name	First Name + Last Name	Lists only those adjusters the USER has authority to assign

2.1.3**Screen Function Definition**

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 <<Previous

When clicked, the USER will be taken back to the previous screen.

2.1.3.2 Process

When clicked, the USER will be taken to the next item in the action item list or a detail of the completed action items. This button ends the use case

2.1.3.3 Cancel

When clicked, the USER will be allowed to cancel the authorization. If this occurs, the rental becomes unauthorized and the rental is no longer the responsibility of the insurance company.

2.1.3.4 Last Action Message

After each action item in the USER's list has been completed, upon arriving at the next item there will be a confirmation message at the top of the screen. This message will be a hyperlink describing the last completed action. If the USER clicks on this link, the system will open the customer file, which will reflect all of the current information for the rental. The USER is then free to make additional changes or to simply view the file.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 Address Line

Entity	ARM: Renter Detail
Column Name	RKADLI
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.2 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.3 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.4 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.5 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMFYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.6 DATE OF LOSS

Entity	A4 Cross Reference
Column Name	X4LSDT
Label Name	DATE OF LOSS
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.7 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.8 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.9 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agency

4.1.10 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.11 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.12 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.13 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.14 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor code is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.15 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier.
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.16 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.17 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.18 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.19 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.20 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.21 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.22 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.23 Renters Night Phone Extensin

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extensin
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.24 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.25 Zip Code

Entity	ARM: Renter Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5. Questions and Answers

Issue Number: 345

Question: Do we force the user to view the Rental Detail in order to change the unassigned adjuster to an adjuster who is authorized to handle?

Status: Closed - Resolved

Resolution: 4-12-00, Randy Haselhorst, we don't want to force them to look at the detail to assign a rental request to another user. They primarily look for claim number, claim type, renter name and possibly date of loss. If you can make the option you've described intuitive, that may work, but it doesn't sound that way to me.

4-12-00, Kim DeVallance, NO - This is a great feature, but I don't know if it is necessary. Some companies use this feature, while others wait for the phone call to authorize.

Issue Number: 346

Question: Should you be allowed to decline, authorize or extend an unassigned rental.

Status: Closed - Resolved

Resolution: 4-12-00, Randy Haselhorst - you can't "extend" until you've authorized. Decline could be an option, but we should probably think about that more to determine if we should. Current state does not have this but I have heard people ask for it. As far as authorizing, that again may be a good idea. I'd like to see Kim and Dave's ideas.

4-12-00, Kim DeVallance - Yes, we have heard this many, many times that will assigning a rental, the user should have the ability to do all these things (as long as the user has the proper authority)

Issue Number: 361

Question: Can we pass along an unassigned to another office?

Status: Pending

Resolution: Yes, If the request is an unassigned status, the USER can transfer it to another office.

Issue Number: 378

Question: Can we Exit the use case after Sending a Message and leave the request unassigned?
Iteration 2 quesiton.

Status: Closed - Resolved

Resolution: 6-23-00 Per Brian Weingart, - yes, after sending a message on an unassigned request, if we didn't assign an adjuster, it is still unassigned.

Issue Number: 413

Question: 6-23-00, Only one person can handle un-assigns – which is set up in the profile? Or can a multiple # of people handle the un-assigns? Does the Handling for drop down box allow for the selection of unassigned? How do we handle record locking? Per Jennifer, Sean is working on this issue.

Status: Pending

Resolution:

Issue Number: 414

Question: 6-23-00, If I select Unassigned from the action item list and only one exists do I go straight to the detail? Per Jennifer - Sean is working on this issue

Status: Pending

Resolution:

Issue Number: 415

Question: 6-23-00, If I select Unassigned from the action item list and multiple exists I go straight to the detail. I go to a screen, which looks like action items, but list all of the unassigned. Per Jennifer - Sean is working on this issue.

Status: Pending

Resolution:

Enterprise Rent-A-Car

Functional Design Specification Authorize a Request

Version 1.1

Last Saved: 10/16/00 10:26 AM

Revision History

Date	Issue	Description	Auth r
April 13, 2000	0.1	Updated with Database Fields	Cindy Bastean, Deb Ealick
April 20, 2000	0.2	Removed subdocuments	Cindy Bastean
May 10, 2000	0.3	Modified according to cross-team review	Cindy Bastean
May 15, 2000	0.3	Added screen change to document according to cross-team review	Debi Ealick
June 8, 2000	0.4	Updates for Iteration 2	Brian Weingart
June 8, 2000	0.4	Added data field information	Cindy Bastean
June 14, 2000	0.4	Added Zefer look and feel image for the Authorize Rental Detail	Amanda Banta
July 3, 2000	0.5	Changed Screen information	Cindy Bastean
July 13, 2000	0.5	Updated Use Case and Screen Design Sections	Brian Weingart, Mike Slater, Johnny Sands, Deb Ealick, Brent Armbruster and Cindy Bastean
August 24, 2000	1.0	Updated Use Case. Changes made based on feedback provided by management reviewers.	Mike Slater
October 4, 2000	1.1	Updated FDS. Changes made based on feedback provided by testing team.	Mike Slater

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Authorize a Request

1. Authorize Request Use Case

1.1 Brief Description

This use case describes how a USER authorizes a direct bill request.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this system to authorize a direct bill request.

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have the authority to authorize a request.
- At least one outstanding unauthorized direct bill request must be assigned that the USER may handle.
- The USER must have selected an Unauthorized Direct Bill Request from the Review Action Items Screen or from the Search Results page.

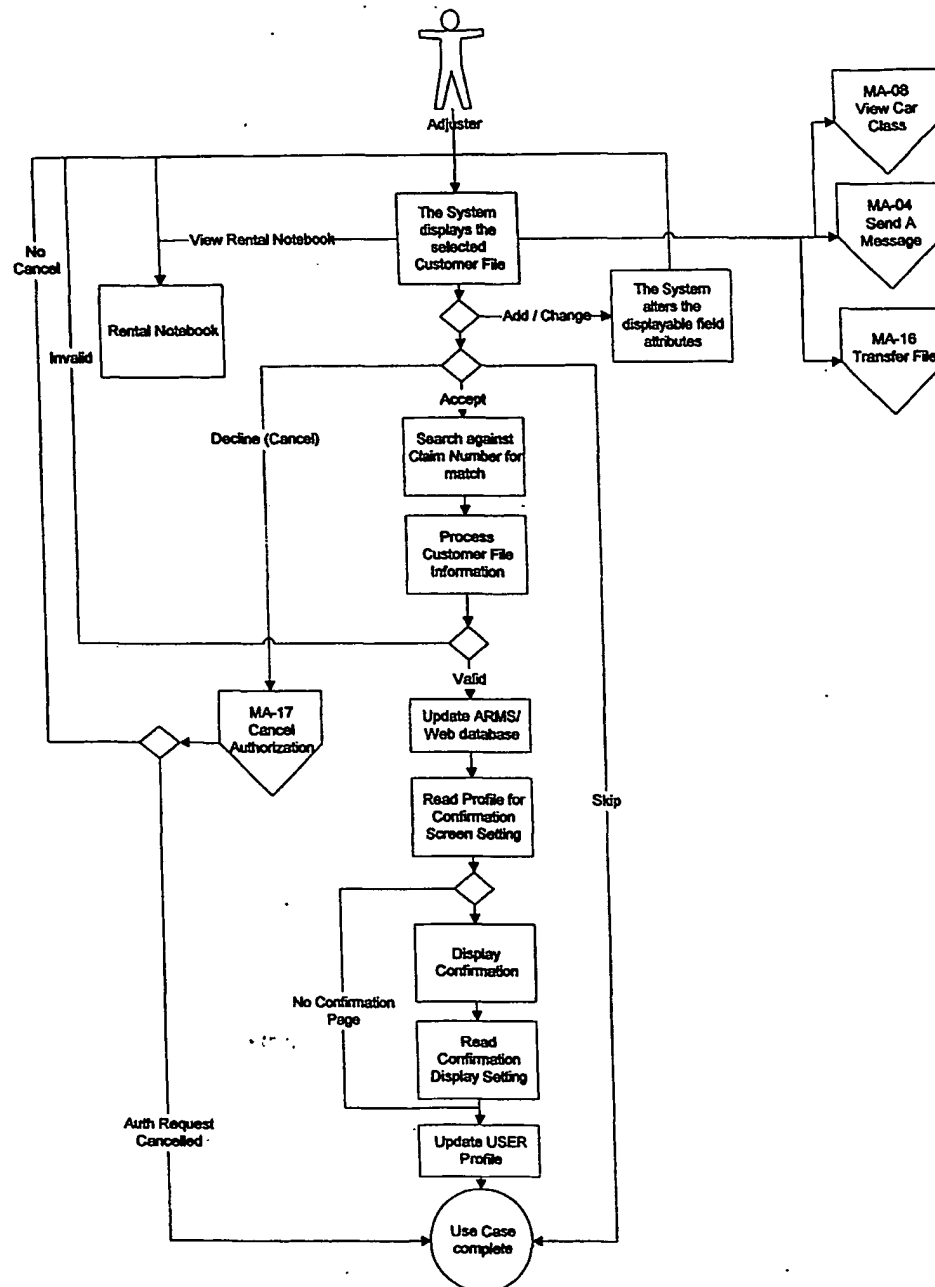
1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to "Authorize Request"

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1.4.1 Activity Diagram

Authorize A Request Activity Diagram



1.4.2 Basic Flow

1. The USER selects an outstanding direct bill to authorize.
2. The system displays the Customer file.
3. The USER reviews the renter's information.
4. The USER inputs a number of Authorized Amounts, days and required fields.
5. The USER submits the Authorization.
6. The system validates information in the Customer File.
7. If the adjuster assigned to the Customer File is 'UNKNOWN' or 'UNASSIGNED', the System will assign the Customer File to the current USER.
8. The system will update the ARMS/Web database with the Authorization.
9. The System reads the user profile to see if the confirmation page should display.
10. If the profile indicates 'Show Confirmation Page', the System will display the confirmation page
11. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 View Notebook

At step 3 of the Basic Flow, the USER can select to view the transaction history (Notebook) by selecting the Go To Notebook link.

1.4.3.2 Add Notes to Customer File

At step 3 of the Basic Flow, the USER can add notes to the Customer File by typing in the appropriate notes field on the Customer File page.

1.4.3.3 Skip Customer File

At step 3 of the Basic Flow, the USER should have the ability to skip to the next action item by clicking the Skip button. After clicking the Skip button, the USER should be taken to the next action item on their current list without any changes to the file being skipped.

1.4.3.4 Change Customer File

At step 3 of the Basic Flow, the adjuster can make changes to the additional details of the Customer File. This is done by selecting the Add / Change link which will invoke an editable page with all *appropriate information editable.

1.5 Post-Conditions

- If the use case was successful then the changes should go in to effect immediately and the screen should revert back to the original screen of entry.
- If the use case was successful, then the ARMS system will be notified of authorization changes.
- If the use case was unsuccessful, then the system state will be unchanged.

1.6 Special Requirements

1.6.1 Requirements for Claim Type Authorizations

The following are a set of requirements surrounding the type of authorized amounts that are allowable based on the Claim Type associated with a rental. These restrictions **DO NOT APPLY** to reservations that are submitted with a Direct Billing Percentage of zero (0).

1.6.1.1 When the Claim Type selected is 'Insured', 'Theft', or 'Uninsured Motorist'

1.6.1.1.1 The reservation/rental must always include an Authorized Rate or both Policy Daily and Maximum Limits as defined by the renter's insurance policy. Zero (0) is an acceptable Policy Daily Limit.

1.6.1.1.2 The reservation/rental must include an Authorized Rate or Policy Daily Limit if a Policy Maximum Limit is included. Zero (0) is an acceptable Policy Daily Limit.

1.6.1.2 When the Claim Type selected is 'Claimant'

1.6.1.2.1 The reservation/rental must always include an Authorized Rate.

1.6.1.2.2 The reservation/rental may not include a Policy Daily/Maximum Limits selection.

1.6.1.3 Requirements for editable fields based on reservation / ticket status

1.6.1.3.1 Depending on the status of the Customer File the adjuster may change the following fields:

Field Name	Unassigned/Unauthorized Reservation/Ticket	Assigned but Unauthorized Reservation or Ticket	Authorized Ticket
CLAIM NUMBER	X	X	X
CLAIM TYPE	X	X	X
LOSS TYPE	X	X	X
DATE OF LOSS	X	X	X
INSURED INFORMATION	X	X	X
RENTER INFORMATION	X		
DATE RENTAL IS NEEDED	X		
ADDITIONAL CHARGES	X	X	X
NUMBER OF AUTHORIZED DAYS	X	X	
BILL-TO PERCENT	X	X	X
POLICY LIMITS	X	X	X
AUTHORIZED RATE	X	X	X

If the Customer File is an Unauthorized Reservation, the adjuster can Reject the Authorization Request, Send a Message, and/or Transfer (Assign) the file to an adjuster.

1.6.1.3.2 If the status of the Customer File is an open ticket the following rules apply:

Actions	Authorized Reservation	Unauthorized Reservation / Ticket	Authorized Open Ticket
Send Message	X	X	X
Extension			X
Terminate Rental			X
Cancel Authorization	X	X	
Transfer/Assign Adjuster	X	X	X
View Car Class	X	X	X

1.7 Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.7.1 MA-04 Send A Message

The Send Message will be used to allow the user to capture messages and diary notes associated with a rental reservation/authorization. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization, or to store the note in the ARMS Web system without sending the message to Enterprise. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.7.2 MA-16 Transfer Work

(The Change Adjuster button invokes this use case).

The ADJUSTER may choose to transfer an authorization to a different adjuster in his/her office or transfer the authorization to another adjuster in a different office.

1.7.3 MA-08 View Car Class

The ADJUSTER may choose to view the car class. This button invokes the View Car Class use case.

1.7.4 MA-17 Cancel Authorization

The ADJUSTER may choose to deny the authorization. When the ADJUSTER selects the CANCEL button, it will invoke the Cancel Authorization use case to reject the authorization

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Authorize Rental Detail

This screen will allow the user to work the currently selected authorization request. The user may set the authorization amounts and policy coverage limits or may assign the request to another adjuster.

2.1.1 Screen Layout – Authorize Rental Detail

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

Authorize Direct Bill: for Henke, Tom Claim no. 765849322-001
CUSTOMER FILE 1 of 4 Action Items

765849322-001 Select a Claim Type

Compact/21.95 20/500 100

Select a Condition

January 1 2000

January 1 2000

[Change or Add]

RENTER INFORMATION:
Henke, Tom
1735 N. Paulina St.
Chicago, IL 60622

Home: (773)554-6054
Work: (773)395-6200
Email: dbowie@zefer.com
Requested email confirmation

RENTAL INFORMATION:
Authorized Class: Standard
Days/Rate: 5 days @ \$21.95/day
Current Class: Compact
Additional Charges: None
Direct Bill %: None
Rental Date: 03/28/2000
Start Date: 03/20/2000

Enterprise Rent-A-Car Location:
Enterprise Edgewater Branch
6400 N. Ashland
Chicago, IL 60622
773-334-5400

ADDITIONAL CLAIM INFORMATION:
Claim Number: 765849322-001
Claim Type: Theft
Insured Name: Lalumandier, Craig
Owner's Vehicle: GMC Suburban 1999
Date of Loss: 03/28/2000
Loss Type: Non-Driveable
Policy: Daily rate/
Maximum dollars: 30/600

Repair Facility:
Elco Chevrolet
Chicago, IL 60621
(773)334-9832

NOTEBOOK:
Message, Belanger, Hugues, 2/20/00
Note from Enterprise, Sarusi, Marty, 2/21/00
Extension Request, 2/24/00
Extension, 2/25/00

top of page

Contact Us | Terms & Conditions | Log Off

Functional Design Specification

Issue: v1.1

Issue Date: 10/20/00

2.1.2 Authorize Rental Detail

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling For:	List Box	30	Handling for Adjuster's Name	First Name + Last Name	N/A.
Note to Enterprise:	Input	0	Message	NOTE	
Notebook	Output	50	Message	NOTE	
Note to Self Only	Input	0	Message	NOTE	
	Output	8	Message Creation Date	Add Date	N/A.
Message	Output	50	Message Text	NOTE	N/A.
	Output	10	Notebook creation date.	Add Date	
Claim no.	Output	30	Claim Number	Insurance Claim Number	
Claim Number:	Input	11	Claim Number	Insurance Claim Number	N/A.
____ days @	Input	4	Number of Days Authorized	Number Of Days Authorized	N/A.
Direct Bill %:	Input	6	Percent Covered	Bill To %	N/A.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Dollars Per Day Covered	N/A.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Max \$ Covered	N/A.
	Output	30	Rental Location Branch Name	Rental Location	N/A.
Date Rental Needed:	List Box	10	Rental Start Date	Start Date	N/A.
days @	List Box	6	Vehicle Rate	Vehicle Rate	N/A.
Insured Name:	Input	30	Insured's Name	First Name + Last Name	N/A.
Insured Name:	Output	20	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	List Box	10	Date of Loss	Date Of Loss	N/A.
Date of Loss	Output	10	Date of Loss	Date Of Loss	
	Output	30	Renter's Address Line	Address Line	
Renter's Address	Output	20	Renter's City	City	
	Output	3	Renter's State /Province Code	State	
	Output	15	Renter's Zip/Postal Code	Zip Code	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	This field is input if the ticket is not opened. It will not be editable if the ticket is open.
Authoriz Direct Bill: for	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter:	Output	30	Renter's Name	First Name + Last Name	N/A.
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Owner's Vehicle	Output	20	Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
	Output	15	Repair Facility City	City	
Repair Facility	Output	20	Repair Facility Name	Repair Facility Name	
	Output	3	Repair Facility State	State	
	Output	10	Repair Facility Telephone Number	Telephone Number	
	Output	7	Repair Facility Zip Code	Zip Code	
Claim Type:	List Box	15	Claim Type	claim type description	N/A.
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	List Box	20	Loss Type	loss type description	
Vehicle Condition	Output	20	Type of Loss	loss type description	
	Input	20	Renter's Email	renter email	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.3.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The arms database will be updated and the data will be sent to the arms system. The use case will then end and the USER will return to the process from which they came.

2.1.3.3 Notebook

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

2.1.3.4 Transfer File

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or adjuster currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

2.1.3.5 Change or Add

When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

2.1.3.6 Top of page

When clicked, the USER will be taken to the top of the current page.

2.1.3.7 View Car Class

When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

3. Application Operations

4. Data Fields**4.1 Data Field Definition**

This section includes a definition of all data fields included in the functional specification

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %

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System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.6 Branch

Entity	A4 Cross Reference
Column Name	br_id
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.7 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)

Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.
----------------------	---

4.1.11 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.12 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.13 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.14 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.15 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY

Functional Design Specification

Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.16 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.17 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies

4.1.18 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.19 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.20 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.21 Group

Entity	A4 Cross Reference
Column Name	grp_id
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.22 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.23 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.24 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.25 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.26 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.27 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.28 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.29 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)

Attribute Definition	
----------------------	--

4.1.30 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.31 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNL
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.32 renter email

Entity	RENTER EXTENSION
Column Name	rentr_aml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.33 Renter Make/Model

Entity	ARM: Renter Detail
Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.34 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.35 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.36 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.37 Renters Night Phone Extensin

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extensin
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.38 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

4.1.39 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 State

Entity	ARM: Rental Location Master
--------	-----------------------------

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Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.41 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.42 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.43 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.44 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.45 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number

Functional Design Specification

System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.47 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.48 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.49 Zip Cod

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5. Questions and Answers

Issue Number: 419

Question: 6-23-00, When rejecting an authorization do we want a reason code?
Per Jennifer - Mike, Brad and Craig is handling this.

Status: Pending

Resolution: 07-03-00 - Brad Reel: In the ARMS Web V2.0 application reason codes will be collected for the following events: reject invoice, terminate authorization. Per a discussion with Randy Haselhorst, it would be worthwhile to collect a reason code for for reject/cancel authorization. However, it is not critical for this release. If possible it should be incorporated.
07-03-00 - Brad Reel: I am reassigning to Mike Slater to work with Neil Fitzgerald and determine whether or not to incorporate in V2.0, or wait until a later release.

Enterprise Rent-A-Car

Functional Design Specification Change Customer File

Version 1.1

Last Saved: 10/17/00 2:23 PM

Revision History

Date	Issue	Description	Author
April 20, 2000	0.1	Created Use Case and Screen Design	Brian Weingart, Debi Ealick and Johnny Sands
April 28, 2000	0.1	Added Use Case and Screen Design as subdocuments	Cindy Bastean
May 3, 2000	0.2	Removed subdocuments and formatted according to standards. Reconciled Screen Design	Cindy Bastean
May 3, 2000	0.3	Added changes from Team Final Review	Cindy Bastean
May 5, 2000	0.4	Made screen changes and added to document.	Debi Ealick
May 16, 2000	0.5	Made Use Case and Activity Diagram modifications as per Cross-Team Review session	Brian Weingart
May 25, 2000	0.6	Added Questions and Answers	Cindy Bastean
May 25, 2000	0.6	Updated Screens and Screen Fields	Debi Ealick, Cindy Bastean
July 3, 2000	0.7	Updated Screen Field and Data Field Information	Cindy Bastean
July 13, 2000	0.7	Updated Use Case and Screen Design sections	Mike Slater, Brian Weingart, Johnny Sands, Deb Ealick, Brent Armbruster and Cindy Bastean
August 24, 2000	1.0	Updated Use Case. Changes made based on feedback provided by management reviewers.	Mike Slater
October 2, 2000	1.1	Updated FDS. Changes made based on feedback provided by the testing team.	Mike Slater

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Change Customer File

1. Change Customer File Use Case

1.1 Brief Description

The Change Authorization use case describes how the USER could change an authorization assigned to a reservation or an open rental.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this case to add or change information related to an existing Customer File on a rental within ARMS Web.

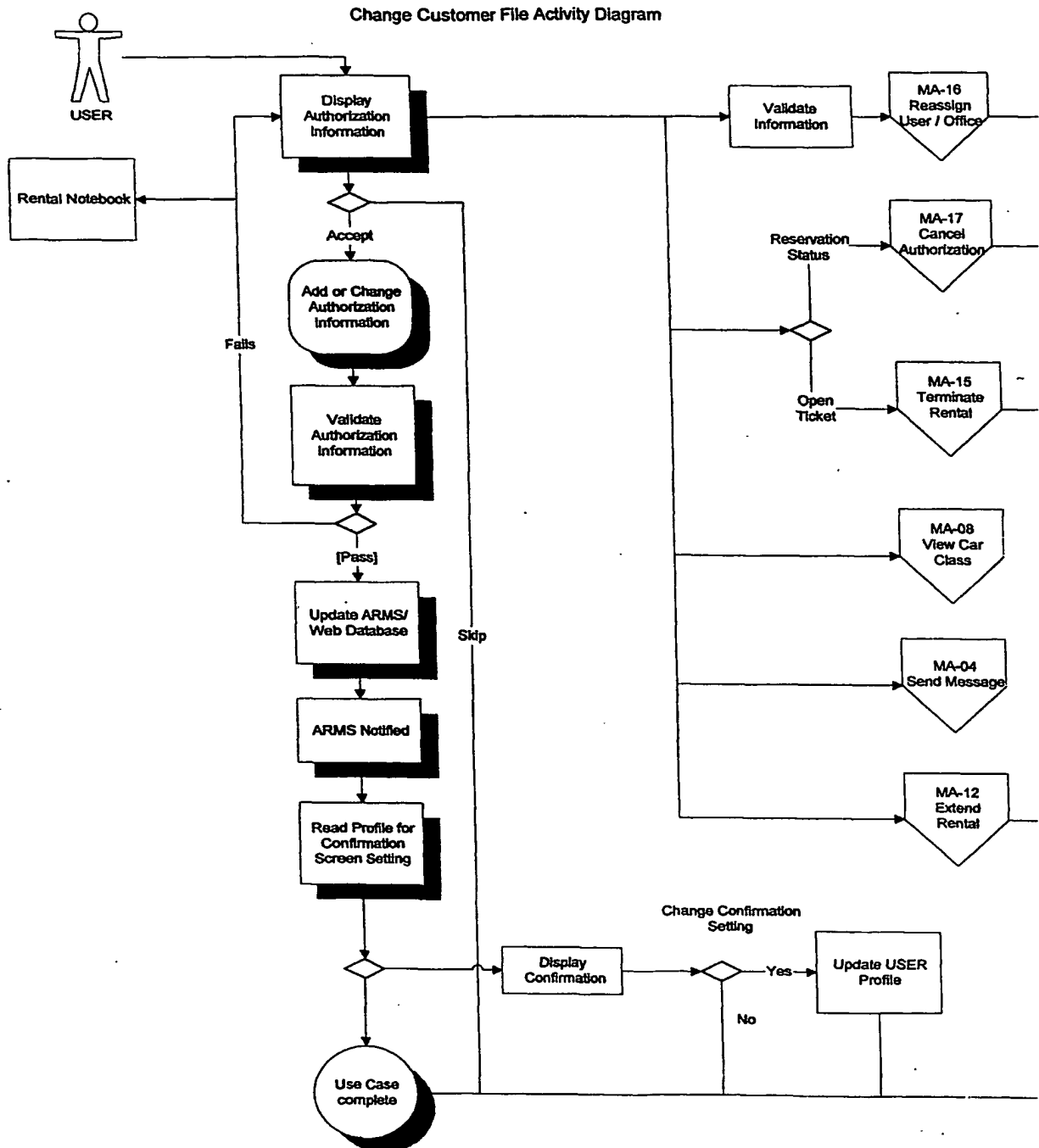
1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have selected to change an existing Customer File.

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes to a Customer File.

1.4.1 Activity Diagram



1.4.2 Basic Flow

1. The USER will select a Customer File to change.
2. The SYSTEM will display the associated Customer File detail of the selected item.
3. The USER will add additional or modify existing information associated with the Customer File.
4. The SYSTEM will validate added or modified data.
5. The SYSTEM will update ARMS Web to reflect the changes.
6. The SYSTEM notifies ARMS of the changes associated with the Customer File.
7. The SYSTEM checks the profile for the confirmation screen setting.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 View Rental Notebook

At step 1, the USER may choose to view the history of a rental. The USER will be able to see the last five diary notes. The USER can also select to view the transaction history or add diary notes from the Extend Rental Detail.

1.4.3.2 Validate Changes

If the USER changes or adds information, which does not pass validation, an error message will notify the USER and return them to step 1 of the Basic Flow.

If an error is discovered in the validation of the reservation / rental information submitted by the USER (Step 3 of the Basic Flow), the system would present the USER with an error message and return them to the Detailed Reservation / Rental Display. If the error is specific to a data field within the form, the field should be highlighted and the error described.

1.4.3.3 Display Confirmation

After step 6, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes have been saved to the ARMS Web database and if appropriate, ARMS Web has generated notification transactions to ARMS.
- If the use case was unsuccessful then the system has remained unchanged.

1.6 Special Requirements

- It will be considered invalid if for a reservation, the Claim Number, Renter First Name, Renter Last Name, Claim Type, Vehicle Condition, Rental Location, Authorized Number of Days, Direct Bill Percent, and at least one Renter Telephone number have not been included.
- It will be considered invalid if the customer has established Claim Number editing and the Claim Number format does not meet the requirements of the customer's Claim Number definition.

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- It will be considered invalid if any field identified as REQUIRED in the company/office profile is not included.
- It will be considered invalid if any data entered violates the data type as specified by the ARMS Web database (i.e., alpha characters in a numeric field).
- A warning will be presented to the USER if any defined limits identified in the company/office/user profile are exceeded (e.g., Maximum Number of Days Authorized). The system will allow the USER to submit the authorization from the warning.
- It will be considered invalid if the selected Claim Type is 'Insured,' 'Uninsured,' or 'Theft' and the reservation does not include an Authorized Rate or does not include both Policy Daily and Policy Maximum Limits (with the exception of reservations with a Direct Bill Percent of zero (0)). A Policy Daily Limit of zero (0) is an acceptable entry.
- It will be considered invalid if the selected Claim Type is 'Insured,' 'Uninsured,' or 'Theft' and the reservation includes a Policy Maximum Limit but does not include an Authorized Rate or Policy Daily Limit (with the exception of reservations with a Direct Bill Percent of zero (0)). A Policy Daily Limit of zero (0) is an acceptable entry.
- It will be considered invalid if the selected Claim Type is 'Claimant' and Policy Limits (Daily or Maximum) have been included.
- It will be considered invalid if the Authorized Number of Days is included and is less than zero (0).
- It will be considered invalid if the Direct Bill Percent is greater than zero (0) and the Authorized Number of Days is zero.
- It will be considered invalid if the Direct Bill Percent is less than zero (0).
- It will be considered invalid if the Direct Bill Percent is greater than one hundred (100).
- It will be considered invalid if the Labor Hours are less than zero (0).
- It will be considered invalid if the Date of Loss is greater than the current date.
- It will be considered invalid if the first three digits (i.e., area code) of any U.S. or Canadian telephone number meet the criteria below:
 - 0XX
 - 1XX
 - The second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

- It will be considered invalid if a U.S. or Canadian telephone number does not consist of 10 digits.
- It will be considered invalid if a U.S. postal code does not consist of 5 or 9 digits.
- It will be considered invalid if a Canadian postal code does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

- It will be considered invalid if an E-mail address is included that does not include an '@' character.
- It will be considered invalid if the Send e-mail Confirmation to Renter flag is set to true and the Renter e-mail address is not included.
- If the customer file is in reservation status, the screen will show a cancel button for the USER to cancel the authorization if desired.
- If the customer file is in open ticket status, the screen will show the set last day button for the USER to terminate the rental if desired.

1.7 Extension Points

1.7.1 MA-04 Send a Message

The Send Message will be used to allow the USER to capture messages and diary notes associated with extending a rental. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization, or to store the note in the ARMS Web system without sending the message to Enterprise. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization File.

1.7.2 MA-16 Reassign USER or Office (The Transfer File button invokes this use case).

After the extend rental detail is displayed, the USER may choose to change the current office/USER. First, the USER would select to change the current office/USER. Second, the system would display a list of authorized offices/users. Third, the USER would select a new office/USER.

1.7.3 MA-15 Terminate a Rental (Set Last Day)

After the extend rental detail is displayed, the USER may choose to terminate the rental. If termination is selected, the USER must enter a reason for the termination of the rental. Termination means the insurance company is no longer willing to pay for the rental. This function (button) is only available for an open ticket. For reservation status, the USER should see the Cancel button.

1.7.4 MA-17 Cancel Authorization

Before step 5 of the Basic Flow, the USER should have the capability to cancel the authorization. Before the USER has made changes that have been updated in the database and sent to ARMS, the Cancel Authorization function (button) should be available for reservation status. However, the USER cannot perform the Cancel function on an open ticket. For an open ticket, the Termination (Set Last Day) function (button) is available.

1.7.5 MA-08 View Car Class

The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

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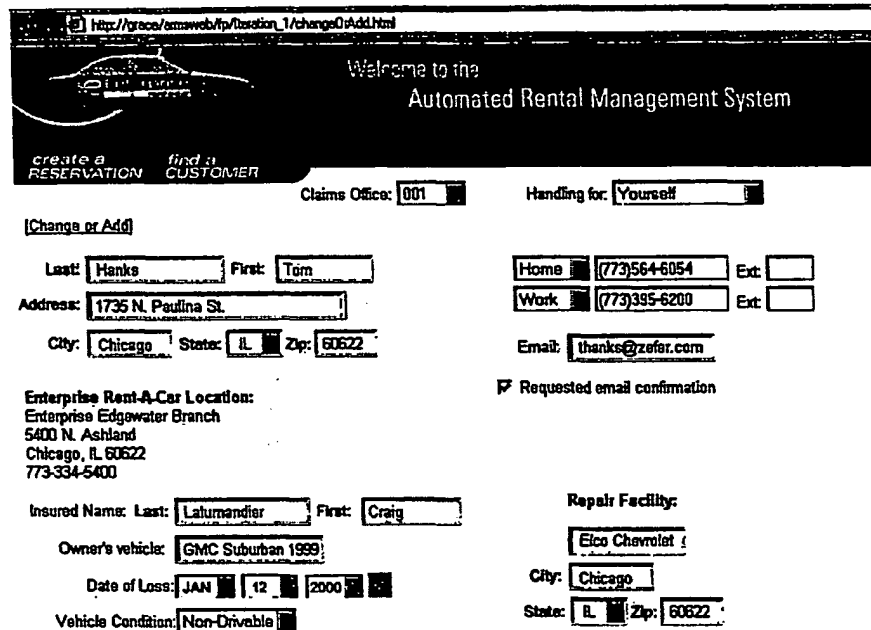
2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Change Rental Detail

This screen will allow the USER to work the currently selected authorization request. The USER may set the authorization amounts and policy coverage limits or may assign the request to another adjuster.

2.1.1 Screen Layout – Change Rental Detail (After clicking the Change or Add link)



http://grace/omaweb/tp/transaction_1/changeOrAdd.html

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

(Change or Add)

Last: Hanks First: Tom

Address: 1735 N. Paulina St.

City: Chicago State: IL Zip: 60622

Enterprise Rent-A-Car Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

Insured Name: Last: Lalumandier First: Craig

Owner's vehicle: GMC Suburban 1999

Date of Loss: JAN 12 2000

Vehicle Condition: Non-Driveable

Home: (773) 564-6054 Ext:

Work: (773) 395-6200 Ext:

Email: thanks@zefer.com

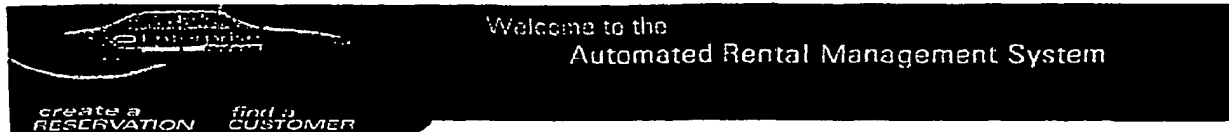
☒ Requested email confirmation

Repair Facility:
Elco Chevrolet
City: Chicago
State: IL Zip: 60622

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(Before clicking the Change or Add Link)



Claims Office: 001

Handling for: Yourself

You just authorized 3 days at \$29.39/day for Hanks, Tom

Customer File: for Bowie, David Claim no. 765849322-001
OPEN

2 of 4 Action Items

Vehicle Type: Compact/21.95	20/500
<input type="text"/>	
<input type="text"/>	

[\[Change or Add\]](#)**RENTER INFORMATION:**Bowie, David
1735 N. Paulina St.
Chicago, IL 60622Home: (773)564-6054
Work: (773)395-6200
Email: dbowie@zefer.com
Requested email confirmation**RENTAL INFORMATION:**Authorized Class: Standard
Days/Rate: 5 days @ \$21.99/day
Current Class: Full-Size
Additional Charges: None
Direct Bill %: None
Rental Date: 03/28/2000
Start Date: 03/20/2000**Enterprise Rent-A-Car Location:**
Enterprise Edgewater Branch
6400 N. Ashland
Chicago, IL 60622
773-334-5400**ADDITIONAL CLAIM INFORMATION:**Claim Number: 3232323232323232323
Claim Type: Theft
Insured Name: Latumandier, Craig
Owner's vehicle: GMC Suburban 1999
Date of Loss: 03/28/2000
Loss Type: Non-Drivable
Policy: Daily rate/
Maximum dollars: 30/600**Repair Facility:**
Elco Chevrolet
Chicago, IL 60621
(773)334-9832**NOTEBOOK:**Message, Belanger, Hugues, 2/20/00
Note from Enterprise, Sarussi, Marty, 2/21/00
Extension Request, 2/24/00
Extension, 2/25/00[top of page](#)[Contact Us](#) | [Terms & Conditions](#) | [Log Off](#)

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2.1.2 Change Rental Detail

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Additional Charges	Output	15	Additional Charges		
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Last Name + First Name
Note to Self Only	Input	50	Message	NOTE	
Messages:	Output	8	Message Creation Date	Add Date	N/A.
Note to Enterprise:	Input	50	Message Text	NOTE	N/A.
	Output	50	Message Text	NOTE	N/A.
Claim Number:	Output	11	Claim Number	Insurance Claim Number	
Days Authorized to Date:	Output	2	Number of Days Authorized	Number Of Days Authorized	N/A.
___ additional authorized days	Output	2	Number of Days to Extend	Number of Days to Extend	
Policy Limits	List Box	5	Policy Maximum and Dollars per day	Max \$ Covered + Dollars Per Day Covered	
	Output	30	Rental Location Branch Name	Rental Location	
days @:	List Box	6	Rental Location Rate	Vehicle Rate	N/A.
Date of Rental	Output	10	Rental Start Date	Start Date	N/A.
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date Of Loss	
	Output	20	Renter City Name	City	
	Output	10	Renter Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Home:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extensin	Not editable if ticket is Open.
	Output	30	Renter's Name	First Name + Last Name	Will not be editable if ticket is open. First Name + Last Name
Renter Information:	Output	30	Renter's Name	First Name + Last Name	N/A.

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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	Will not be able to edit if ticket is Open.
Owner's vehicle:	Output	4	Vehicle Year, Make and Model	Renter Make/Model + Renter Vehicle Year	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
	Input	16	Body Shop Phone Number	Telephone Number	
	Output	15	Repair Facility City	City	
	Output	3	Repair Facility State	State	
	Output	7	Repair Facility zip code	Zip Code	
Last Day authorized	Output	10	Date rental is authorized through	CALCULATED	Calculated field. Populated with an Open Ticket only.
Charges to Date:	Output	10	Total Charges	CALCULATED	
Renter Type	Output	10	Claim type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	Output	15	Type of Loss	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	Will not be able to edit if ticket is Open.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.3.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The arms web database will be updated and the data will be sent to the arms system. The use case will then end and the USER will return to the process from which they came.

2.1.3.3 Notebook

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

2.1.3.4 Set Last Day

When clicked, the system will terminate the rental. The USER will be prompted to enter a termination date for this rental. This coincides with the use case MA-15-Terminate Rental.

2.1.3.5 Transfer File

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or adjuster currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the

profiled start page, depending on the screen from which the USER began.

2.1.3.6 Change or Add

When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

2.1.3.7 Top of page

When clicked, the USER will be taken to the top of the current page.

2.1.3.8 View Car Class

When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

2.1.3.9 Extend Rental (checkbox)

When checked and the process button is clicked, the system will validate the input and accept the extension AND any other changes made to the customer file. The arms web database will be updated and the data will be sent to the arms system. The use case will then end and the USER will proceed to the next action item. (If unchecked and the process button is clicked, only the changes to the screen will be saved. The extension will NOT be executed.)

2.1.3.10 Last Action Message

After each action item in the USER's list has been completed, upon arriving at the next item there will be a confirmation message at the top of the screen. This message will be a hyperlink describing the last completed action. If the USER clicks on this link, the system will open the customer file, which will reflect all of the current information for the rental. The USER is then free to make additional changes or to simply view the file.

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3. Application Operations

Change Customer File

Issue: v1.1
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This section includes a definition of all data fields included in the functional specification

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Branch

Entity	ARM: Rental Location Master
Column Name	Branch
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

Change Customer File

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4.1.6 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPECDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.10 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types.

Change Customer File

Issue: v1.1

Issue Date: 10/20/00

	For example: Insured, Claimant, Uninsured Motorist, etc.
--	--

4.1.11 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.12 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.13 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.15 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:

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System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies

4.1.16 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.17 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.18 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.19 Group

Entity	ARM: Rental Location Master
Column Name	Group
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.20 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO

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Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.21 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.22 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.23 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.24 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.25 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc

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Issue: v1.1

Issue Date: 10/20/00

Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.26 message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)
Attribute Definition	The message ecars indicator indicates whether the message is sent/received from the ecars system.

4.1.27 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.28 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.29 Rate Charged

Entity	ARM: Authorization(Claim Info)
Column Name	AZRTCH
Label Name	Rate Charged
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.30 Rental Location

Entity	ARM: Authorization(Claim Info)
--------	--------------------------------

Change Customer File

Issue: v1.1

Issue Date: 10/20/00

Column Name	AZRNL
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.31 renter email

Entity	RENTER EXTENSION
Column Name	rent_r_email
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.32 Renter Make/Model

Entity	ARM: Renter Detail
Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.33 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.34 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.35 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone

Change Customer File

Issue: v1.1
Issue Date: 10/20/00

System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.36 Renters Night Phone Extensin

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extensin
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.37 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

4.1.38 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.39 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 State

Entity	ARM: Rental Location Master
Column Name	LOSACD

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Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.41 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.42 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.43 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.44 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.45 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number
System Name	

Change Customer File

Issue: v1.1
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Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.47 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.48 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.49 Zip Code

Entity	ARM: Renter Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.50 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Change Customer File

Issue: v1.1
Issue Date: 10/20/00**5. Questions and Answers****Issue Number: 368**

Question: Can the Adjuster shorten the number of days authorized without terminating the rental.

Status: Closed - Resolved

Resolution: 5-3-00, Brian Weingart, Kim DeVallance - No. After an ticket is open and has been authorized, the only modification allowed to the number of days authorized comes in the form of a termination. For example, if an adjuster sent us ten days and on the fifth day, decided to only give us a total of six (thereby removing the authorization for four days) the adjuster would have to terminate that rental as of the sixth day.

Issue Number: 386

Question: Should the Date of Loss be editable in Change Authorization or does it depend on the state of the reservation/ticket.

Status: Closed - Resolved

Resolution: 6-23-00, Brian Weingart, - Since Date of Loss is considered Insurance company information, the adjuster owns this information. The Adjuster can change this in either an reservation or open ticket status. This is editable until the rental is considered closed.

Enterprise Rent-A-Car

Functional Design Specification Terminate Rental

Version 1.0

Last Saved: 10/6/00 9:16 AM

ARMS Redesign Project - Release 1.0
 Terminate Rental

Issue: v1.0
 Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
April 20, 2000	0.1	Created Use Case and Screen Design	Brian Weingart, Debi Ealick and Johnny Sands
April 28, 2000	0.1	Linked Use Case and Screen Design subdocuments to master document	Cindy Bastean
May 3, 2000	0.2	Removed Subdocuments and formatted according to standards	Cindy Bastean
May 11, 2000	0.2	Changed screen design, and added to document	Debi Ealick
May 16, 2000	0.3	Revised according to cross team QA	Cindy Bastean
May 25, 2000	0.4	Added dropdown reason box to Terminate Rental Screen	Deb Ealick
May 25, 2000	0.4	Added 'Reason' to screen field section	Cindy Bastean
June 8, 2000	0.5	Added data field information	Cindy Bastean
July 3, 2000	0.6	Changed screen field and data field information per Zefer look & feel	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Field sections	Brian Weingart, Debi Ealick, Johnny Sands, Brent Armbruster, Stan Schuchat, Mike Slater and Cindy Bastean
October 5, 2000	1.0	Updated Use Case and Screen Field sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Terminate Rental

1. Terminate Rental Use Case

1.1 Brief Description

The Terminate Rental use case describes how the USER would terminate a rental. This use case will allow the USER to inform Enterprise of the last day that the ADJUSTER will pay for a rental. In most cases, by providing a date in the future, Enterprise will receive an extension through the last day.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this case to terminate a rental.

1.3 Pre-Conditions

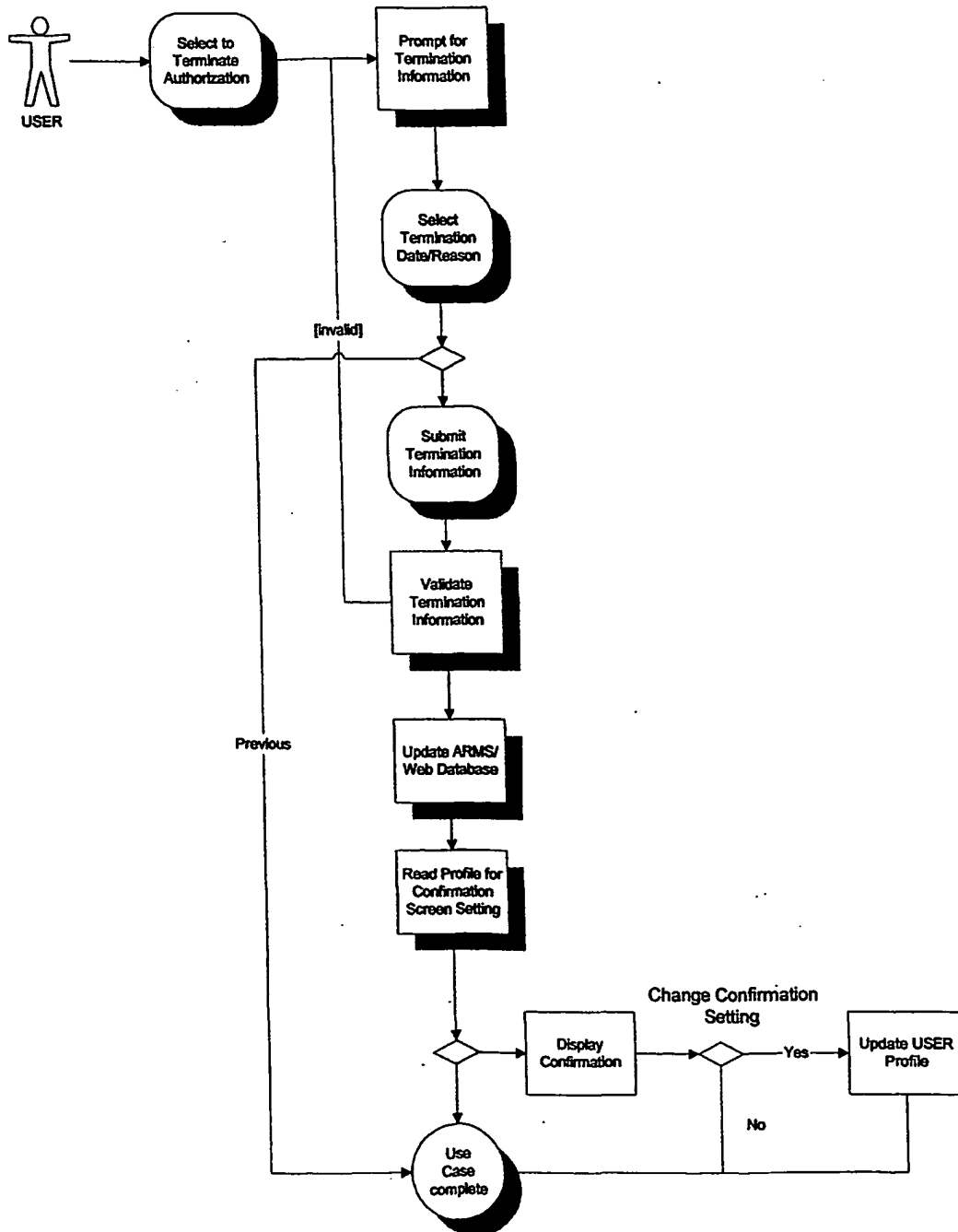
- The USER must be logged into the ARMS Web system.
- The USER must have the authority to terminate an open rental.
- The USER must have selected an authorized rental.

1.4 Flow of Events

The Flow of Events will include the necessary steps to terminate a rental.

1.4.1 Activity Diagram

Terminate Rental Activity Diagram



1.4.2 Basic Flow

1. The USER selects to terminate an authorization.
2. The system prompts the USER for the termination information.
3. The USER enters the termination date and reason/comments.
4. The USER submits the termination information.
5. The system will validate the termination information.
6. The system updates the ARMS Web database.
7. The system reads the USER profile for the confirmation settings.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Previous

After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the "Previous" button, the USER will be returned to the screen from which they came.

1.4.3.2 Additional Comments

When terminating a rental, the USER must select a reason from the drop-down box to explain why the termination is taking place. As well, if further explanation is desired there is a comment box in which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects "Other" from the reason code drop-down box. In this case, the comment box must be used.

1.4.3.3 Display Confirmation

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional; therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes will go into effect immediately and write a transaction record to pass to ARMS indicating that there was a change on the rental. If the renter's email address was entered, a system-generated message will notify the renter.
- If the use case was unsuccessful then the system will remain unchanged.

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1.6 Special Requirements

- 1.6.1 The termination date must be greater than or equal to the current date or the last day authorized. There is a business rule that ensures that an adjuster cannot take away already used rental days.

Current Date	Authorization Date	Termination Date
6/20	6/25	>=6/20
6/20	6/10	>=6/10

- 1.6.2 If the USER extends an authorization that has been terminated, the termination information is considered invalid.
- 1.6.3 It is mandatory that a USER select a termination reason from the drop-down list. If the USER selects "Other" from the drop-down list, a comment about the termination must be supplied.

1.7 Extension Points

None.

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Terminate Rental

This screen will allow the user enter the information about terminating a rental.

2.1.1 Screen Layout – Terminate Rental

2.1.2 Terminate Rental

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Comment:	Input	50	Message Text	NOTE	Required field if Reason selected is "Other"
Reason:	List Box	30	Reason	NOTE	Required Field
Termination Date	List Box	10	Termination Date	Termination Date	The date entered must be the current date or later. This is the date that the insurance company will no longer pay for the rental. / This field should have a calendar control associated with it to allow the user to select the date of loss from a calend
Renter:	Output	30	Renter's Name	First Name + Last Name	Renter's Last Name + Renter's First Name

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2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Previous

Will return the user to the detail screen from which they came. The system and the information on the detail screen will remain unchanged

2.1.3.2 Process

When clicked, the system will complete the termination of the rental and notify the required parties.

2.1.3.2.1 The user must have selected a valid termination date that is greater than the current date

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3. Application Operations

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Issue: v1.0
 Issue Date: 10/20/00

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 Company Id

Entity	ARM: ARMS/400 Internal Error Log File
Column Name	E4CUID
Label Name	Company Id
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.2 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.3 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies

4.1.4 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.5 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	

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Data Type	CHAR(15)
Attribute Definition	

4.1.6 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.10 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.11 Termination Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZTMDT
Label Name	Termination Date

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System Name	
Data Type	NUMERIC(8)
Attribute Definition	

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Terminate Rental

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Issue Date: 10/20/00

5. Questions and Answers

Issue Number: 373

Question: How is the renter currently notified of a termination of the rental? Are they usually notified by the time the rental is terminated? How should this be represented on the screen? Should the checkbox say to notify the renter or that the renter has already been notified?

Status: Pending

Resolution:

Enterprise Rent-A-Car

Functional Design Specification Transfer File

Version 0.6

DRAFT

Last Saved: 10/9/00 1:24 PM

ARMS Redesign Project - Release 1.0
Transfer File

Issue: v1.0
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
April 25, 2000	0.1	Created Use Case and Screen Design	Mike Slater, Debi Ealick and Johnny Sands
May 3, 2000	0.1	Attached subdocuments to master document	Cindy Bastean
May 8, 2000	0.2	Removed Subdocuments and formatted according to standard	Cindy Bastean
May 8, 2000	0.3	Made changes according to final team review	Cindy Bastean
May 15, 2000	0.4	Added screens according to final team review	Debi Ealick
May 22, 2000	0.4	Incorporated changes discussed in cross team QA	Cindy Bastean
June 8, 2000	0.5	Added data field information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 13, 2000	0.6	Updated Use Case and Screen Design sections	Mike Slater, Debi Ealick Johnny Sands , Brian Weingart, Brent Armbruster and Cindy Bastean
October 6, 2000	1.0	Updated Use Case and Screen Design sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Issue: v1.0
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Transfer File

1. Transfer File Use Case

1.1 Brief Description

The Transfer File use case describes how the user would assign one of their action items to another user/office.

1.2 Use Case Actors

The following actors will interact with this use case. Each of the actors can be defined generically as USER. The USER will use this use case to reassign action items to other USERS and/or offices.

- ADJUSTER
- PROCESSOR

1.3 Pre-Conditions

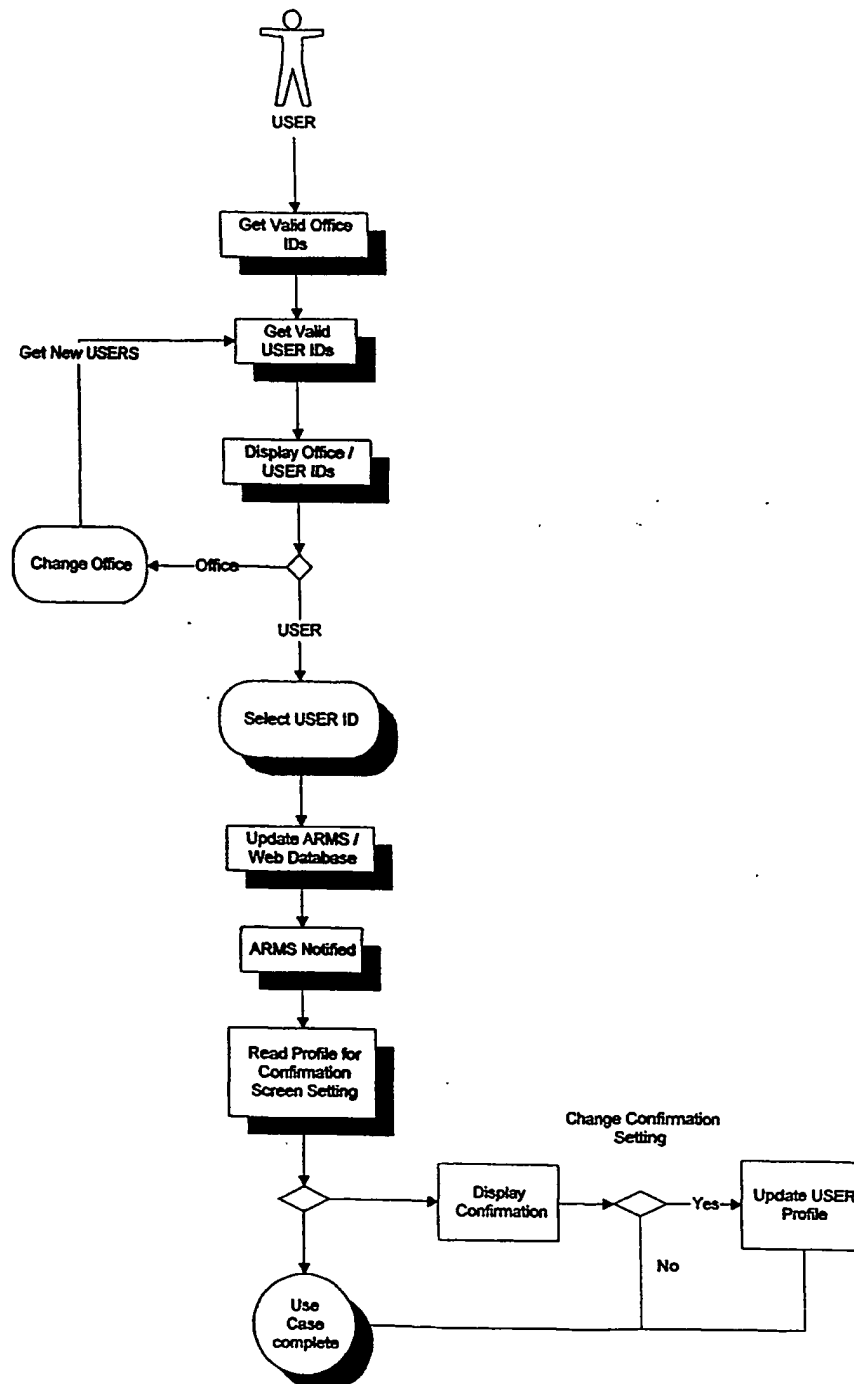
- The USER must be logged into the ARMS Web system.
- The USER must have the ability to reassign action items.
- The USER must have access to a customer file to reassign.
- The customer file must be in an open, reservation, or unauthorized state.

1.4 Flow of Events

The Flow of Events will include the necessary steps for a USER to reassign action items.

1.4.1 Activity Diagram

Reassign User/Office Activity Diagram



1.4.2 Basic Flow

1. The USER selects to reassign a customer file.
2. The system retrieves the list of valid offices to display.
3. The system retrieves the list of valid USERS to display based on reservation/ticket status.
4. The system displays the list of adjusters for the current office and the list of other valid offices.
5. The USER selects the user that will be the new owner of the selected action item.
6. The system will update the ARMS Web database to reflect the recent ownership change and changes, if any, from the prior screen.
7. The system generates a message indicating that a transfer and any other changes have been completed.
8. The system updates the ARMS Web database and notifies ARMS with an Authorization Change transaction.
9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Change Office

After step 3 of the basic flow, the USER may choose to assign the action item to a new office. If the USER chooses a new office, the flow would return to step 2 of the basic flow. This should reflect possible recipients of the action item from that office.

1.4.3.2 Cancel Use Case

The USER may cancel the use case at any point prior to updating the ARMS Web Database. If the USER elects to cancel the use case, the customer file will not be transferred, however, any other changes that were made to the file will remain.

1.4.3.3 Display Confirmation

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes should go in to effect immediately and the new owner should be able to view the newly assigned action item.
- If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

- When building the list of valid USERS, the system will determine the status of the reservation / ticket and retrieve all users in the current office with authority to process that status of a reservation / ticket.
- When building the list of valid Offices, the system will retrieve all other offices defined within ARMS Web as valid offices for the specified company.
- When selecting an office for the reassign operation, the system must rebuild the user list so the USER will only see valid users that are able to complete the action item to be transferred.
- After the changes have been submitted, the next Action Item will populate indicating that a transfer has been completed, if the USER started from the Action Item List.

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Issue: v1.0

Transfer File

Issue Date: 10/20/00

- After the changes have been submitted, the USER will return to the profiled start page with a message indicating that a transfer has been completed, if the USER arrived at the customer file via the search option.

1.7 Extension Points

None

ARMS Redesign Project - Release 1.0
Transfer File

Issue: v1.0
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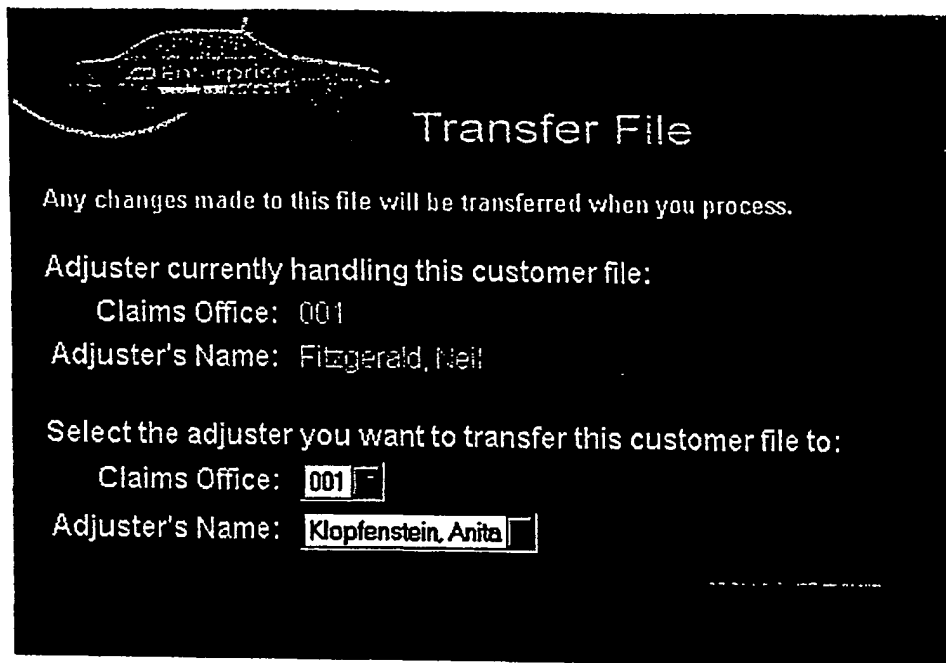
2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Transfer File

This screen will allow the user to pick which functions that they may want to change.

2.1.1 Screen Layout – Transfer File



Transfer File

Any changes made to this file will be transferred when you process.

Adjuster currently handling this customer file:

Claims Office: 001

Adjuster's Name: Fitzgerald, Neil

Select the adjuster you want to transfer this customer file to:

Claims Office: 001

Adjuster's Name: Klopfenstein, Anita

2.1.2 Transfer File

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Adjuster's Name	ListBox	30	Change to Adjuster's Name	First Name + Last Name	List of adjuster's within the currently selected Assign to Claim Office that are authorized to handle the current request type. The adjuster that the request is currently assigned to will be selected upon entry into the screen.
Adjuster's Name:	Output	30	Current Adjuster's Name	First Name + Last Name	N/A.
Claims Office	ListBox	3	Change to Office Id	external organization identifier	List of office within the current Company Structure that are authorized to handle the current request type. The office that the request is currently assigned to will be selected in the drop down box upon entry into the screen.
Claims Office:	Output	3	Current Office Id	external organization abbreviated name	N/A

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Issue: v1.0

Transfer File

Issue Date: 10/20/00

2.1.3 Screen Function Definition

2.1.3.1 Cancel

When clicked, the USER will be returned to the screen/use case where they were prior to selecting Change Office/Adjuster (Transfer). Any changes made will be lost and the system will remain unchanged.

2.1.3.2 Process

When clicked, the changes made will be validated. If the validation passes, the update will be sent to the ARMS system and the USER will be returned to the screen/use case from which they came. If the validation fails, the USER will be returned to the current screen with error message(s) and the field in error highlighted

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Transfer File

Issue: v1.0
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3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.2 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.

4.1.3 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.4 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification Cancel Authorization

Version 1.0

Last Saved: 10/9/00 3:34 PM

Revision History

Date	Issue	Description	Author
May 1, 2000	0.1	Created Use Case and Screen Design	Keith Baker, Debi Ealick and Johnny Sands
May 3, 2000	0.1	Attached subdocuments to master document	Cindy Bastean
May 8, 2000	0.2	Removed subdocuments and formatted according to standards	Cindy Bastean
May 8, 2000	0.3	Made changes according to final team review	Cindy Bastean
May 22, 2000	0.4	Incorporated changes discussed in Cross Team QA	Cindy Bastean
May 25, 2000	0.4	Updated Screens and Fields	Debi Ealick
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Design sections	Brian Weingart, Mike Slater, Debi Ealick, Johnny Sands, Brent Armbruster, Stanley Schuchat and Cindy Bastean
October 9, 2000	1.0	Updated Use Case and Screen Design sections based on feedback provided by management reviewers and the testing team.	Mike Slater

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Cancel Authorization

1. Cancel Authorization Use Case

1.1 Brief Description

This use case will describe how a USER would cancel an authorized reservation.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will be able to perform the duties of canceling an authorized reservation.

1.3 Pre-Conditions

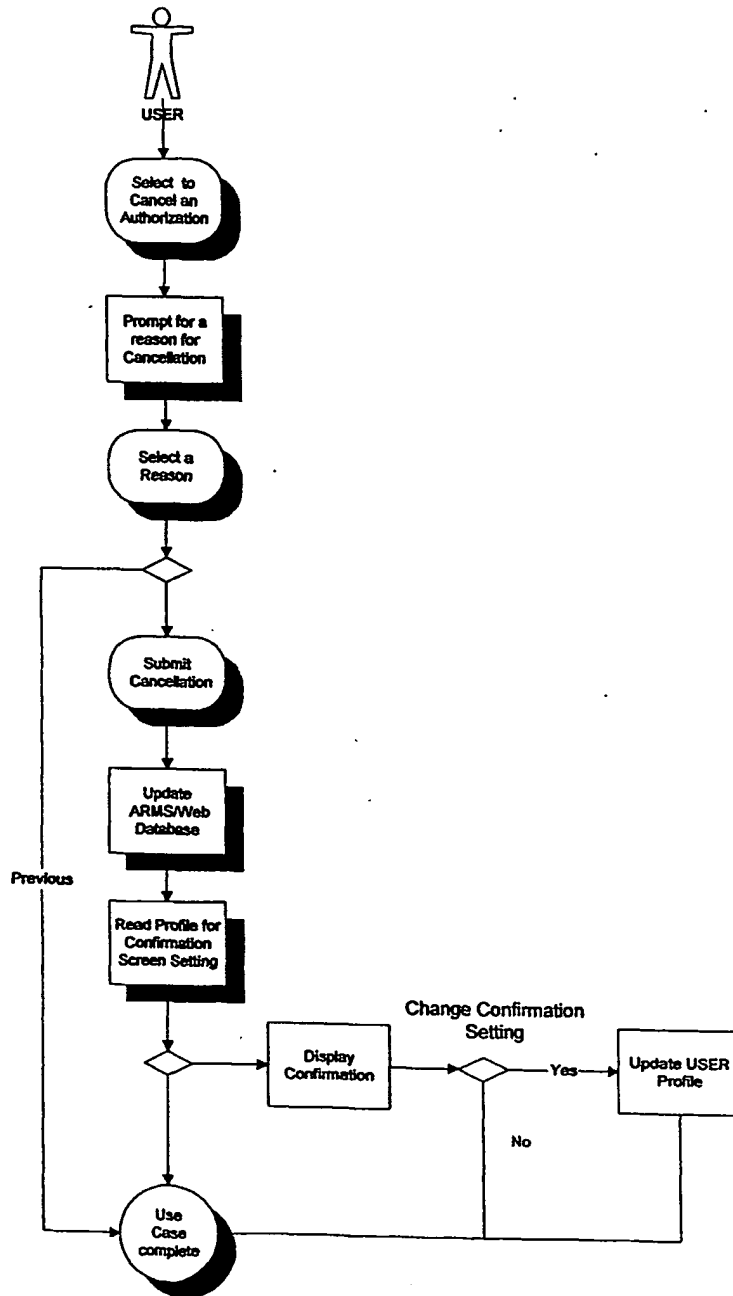
- The USER must be logged into the ARMS Web system.
- The USER must have the ability to cancel an authorization.
- The USER has selected an authorized reservation and wants to cancel the authorization within ARMS Web.

1.4 Flow of Events

The Flow of Events will include the necessary steps to "Cancel Authorization".

1.4.1 Activity Diagram

Cancel Authorization Activity Diagram



1.4.2 Basic Flow

1. The USER selects to cancel the authorization.
2. The system will prompt the user for a reason for cancellation.
3. The USER will select a reason.
4. The USER will submit the cancellation.
5. The system will update the ARMS Web database to reflect that the USER cancelled the Authorization.
6. The system will read the USER profile for the confirmation settings.
7. This ends the use case.

1.4.3 Alternative Flows**1.4.3.1 Previous**

After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the "Previous" button, the USER will be returned to the screen from which they came.

1.4.3.2 Additional Comments

When canceling a rental, the USER must select a reason from the drop-down box to explain why the cancellation is taking place. As well, if further explanation is desired, there is a comment box in which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects "Other" from the reason code drop-down box. In this case, the comment box must be used.

1.4.3.3 Display Confirmation

After step 6, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

- If the use case was successful then the changes should go in to effect immediately and generate a transaction record to pass to ARMS indicating that the authorized reservation was cancelled.
- If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

- When canceling an authorization, the USER must select a reason from the drop-down list. If the USER chooses "Other" from the pre-defined list, a comment about why the authorization was cancelled must be supplied.

1.7 Extension Points

None

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Cancel Direct Bill Authorization

This screen will allow the user to pick which functions that he/she may want to change.

2.1.1 Screen Layout – Cancel Direct Bill Authorization

Cancel Item
Cancel Direct Bill Authorization

You have chosen to cancel the following item.

Renter's Name	Claim #
Weber, Andrew	364829464092223542

Reason: Duplicate Reservation/Authorization

Comment:

2.1.2 Cancel Direct Bill Authorization

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reason	List Box	50	Cancellation Reason	NOTE	N/A
Comment:	Input	50	Message Text	NOTE	Required if cancellation reason is "Other"
Claim #	Output	30	Claim Number	Insurance Claim Number	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	N/A

2.1.3 *Screen Function Definition*

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 *Previous*

When clicked, the user will be returned to the screen/use case where they were prior to selecting Cancel Reservation. Any changes made will be lost and the system will remain unchanged.

2.1.3.2 *Process*

When clicked, system will update the message file with the comment record if entered and mark the current reservation authorization as cancel. The cancellation and the new message, if entered, will be forwarded to the ARMS system. The system returns the USER to the appropriate Action Items List screen.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 Cancel Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNDT
Label Name	Cancel Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Cancellation Code

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNCD
Label Name	Cancellation Code
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.3 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.4 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.5 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.6 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.8 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNL
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

ARMS Redesign Project - Release 1.0
Cancel Authorization

Issue Number: 418
Issue Date: 6/20/00

5. Questions and Answers

Issue Number: 418

Question: Do we need a reason to cancel - have cancel page.

Status: Closed - Resolved

Resolution: 6-23-00, Per Neil, kill this page, it's not necessary.

Enterprise Rent-A-Car

Functional Design Specification View Customer File

Version 1.0

Last Saved: 10/3/00 2:05 PM

View Customer File

Revision History

Date	Issue	Description	Author
May 23, 2000	0.1	Initial Draft	Michael Slater, Deb Ealick, Johnny Sands
May 24, 2000	0.2	Removed subdocuments for final review	Cindy Bastean
May 24, 2000	0.3	Incorporate changes per final team review	Cindy Bastean
May 31, 2000	0.4	Incorporated changes per cross team QA; Added Screen Design	Cindy Bastean; Debi Ealick
June 8, 2000	0.5	Add data field information	Cindy Bastean
July 5, 2000	0.6	Updated screen field and data field information	Cindy Bastean
July 14, 2000	0.6	Updated Use Case and Screen Design Sections	Michael Slater, Deb Ealick, Johnny Sands, Brian Weingart, Brent Armbruster, Stan Schuchat and Cindy Bastean
October 3, 2000	1.0	Updated Use Case and Screen Design Sections	Michael Slater

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View Customer File

1. Search and View Customer File

1.1 Brief Description

This use case describes the process that a USER would use to find and view information regarding a rental. In order to view the rental detail, one of two general conditions must be satisfied:

- 1) The rental is open and the USER does not have any authority to make changes
- 2) The rental is in a state that no longer allows changes to be made.

If these conditions are not met, the USER will be taken to the appropriate use case.

1.2 Use Case Actors

All actors will use the use case to View Rental Detail in the ARMS Web system. All of the following actors can be defined generically as a USER:

- ADJUSTER
- PROCESSOR
- COMPANY MANAGER
- ENTERPRISE ADMINISTRATOR
- COMPANY ADMINISTRATOR

1.3 Pre-Conditions

- The USER must be signed-on to the system
(AND)
- The USER does not have the authority to make changes and the ticket is open,
(OR)
- The ticket is in a state that doesn't allow changes to be made.

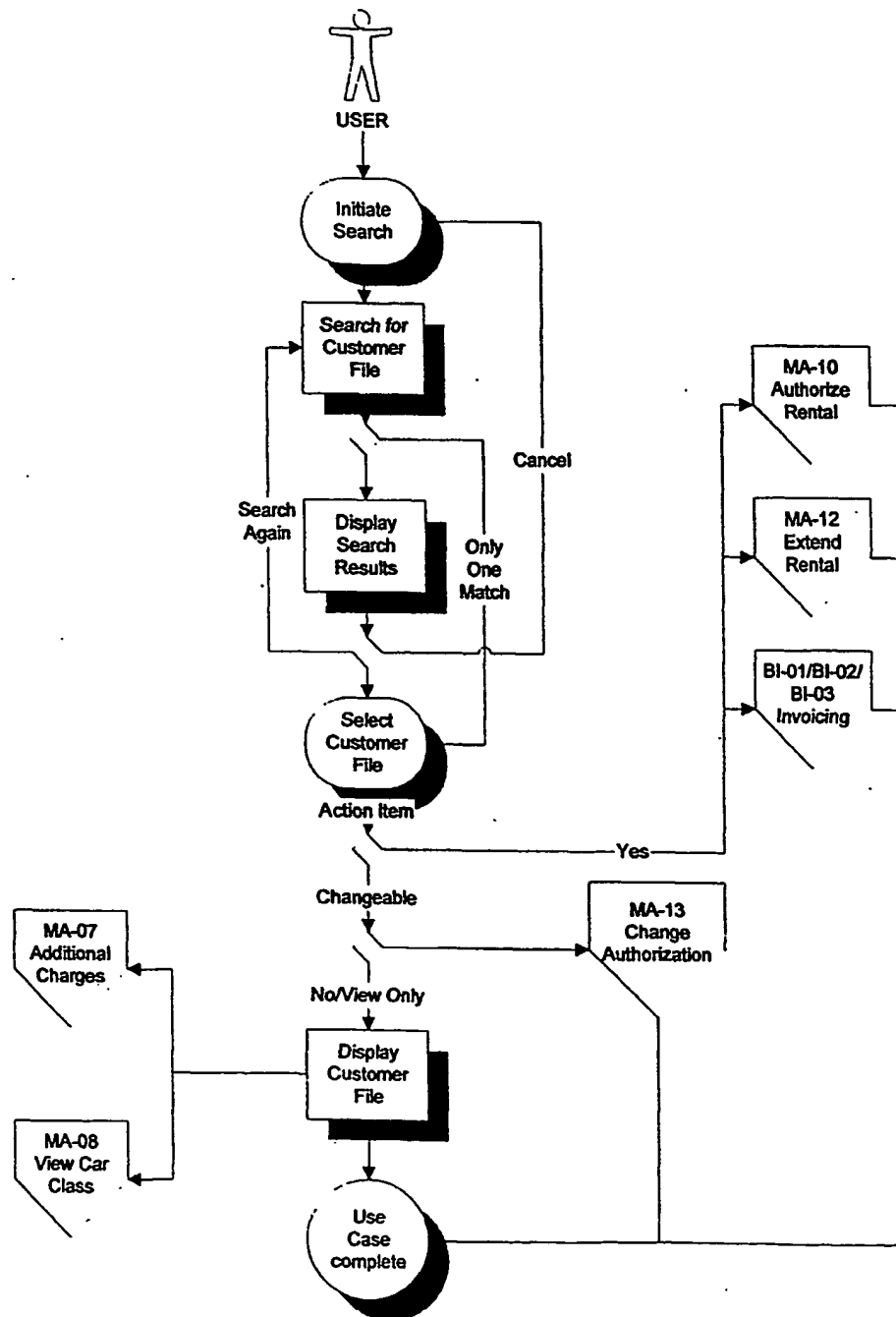
1.4 Flow of Events

The Flow of Events includes all the steps necessary to View Rental Detail in the ARMS Web system.

View Customer File

1.4.1 Activity Diagram

View Customer File Activity Diagram



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Reference source not
found.
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View Customer File

1.4.2 Basic Flow

The Basic Flow of the View Rental Detail use case includes all of the required activities for the USER to successfully find and view information regarding an open rental.

1. The USER initiates a search for a Customer File.
2. The system, based on criteria entered by the USER, retrieves the matches for that search.
3. The system displays the search results.
4. The USER selects one of the matches.
5. The system displays the detail of the Customer File.
6. This ends this use case.

1.4.3 Alternative Flows**1.4.3.1 Search Again**

After step 3 of the basic flow, the USER may decide that they would like to conduct another search. By entering new search criteria, they would return to step 2 with new criteria and the use case could continue.

1.4.3.2 Only One Match Found

At step 2 of the basic flow, if the system only finds one match, the system will advance to step 5 of the basic flow invoking the appropriate use case for modifications.

1.4.3.3 View Only

If the Customer File selected was in a state not allowing changes, the system would display the Customer File, however, not allowing the USER to modify any information within ARMS Web.

1.5 Post-Conditions

- If the use case is successful, the system will return to its previous state.
- If the use case is unsuccessful, the use case the system will remain unchanged.

1.6 Special Requirements

To successfully locate a customer file, the following criteria must be satisfied:

1. The following fields will limit the search results: Adjuster Name, Last Authorized Day, Date of Loss, and/or a status of the Customer File.
 - a. If a Renter Last Name has been supplied, an exact match on last name is considered valid
 - b. If a Renter Last Name and Renter First Name has been supplied and there is no exact match on Renter Last Name, there is no match.
 - c. If a Renter Last Name and Renter First Name has been supplied and there is an exact match on Renter Last Name and not an exact match on Renter First Name, the Renter Last Name with the closest Renter First Name is considered a match.

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Reference source not
found.

View Customer File

Issue Date: 10/20/00

- d. If a Renter Last Name and Claim Number has been supplied and there is an exact match on Renter Last Name and not on Claim Number, the closest match on Renter Last Name and the closest match on Claim Number greater than the Claim Number provided is considered a match.
2. If the USER supplies one or more of the following fields, the above result set will position to closest match of Customer Files based on: Renter Last Name, Renter First Name, and/or Claim Number.
3. This search capability will include all available Open and Closed Rentals for searching.
4. Any empty fields signify the search should not limit the result set by that field.
5. Any Customer File present in the result set will contain a link to the appropriate use case based on the current status of the reservation or rental.

1.7 Extension Points

1.7.1.1 MA-10 Authorized a Request

If the customer file were an unauthorized reservation or ticket, the system would enter the Authorization use case to allow the USER to authorize this Customer File.

1.7.1.2 MA-12 Extend Rental

If the customer file were an authorized ticket or an action item of extension status, the system would enter the Extend Rental use case to allow the USER to extend this Customer File.

1.7.1.3 MA-13 Change Authorization

If the customer file were an authorized reservation or ticket not requiring any immediate action, the system would enter the Change Authorization use case to allow the USER to authorize this Customer File.

1.7.1.4 MA-07 Additional Charges

The Additional Charges use case will be used to add special charges to the reservation being created by the USER (e.g., CDW). Any Additional Charges captured should be returned and applied to the reservation. The existence of Additional Charges should be reflected on the reservation screen.

1.7.1.5 MA-08 View Car Class

The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

1.7.1.6 Invoicing – BI-01-Handle Unapproved Invoices & BI-02-Pay Approved Invoices & BI-03 Reject an Invoice

At step 5, the USER may elect to view approved invoices, unapproved invoices, or rejected invoices. Upon completion of this process, the USER should be returned back to step 5 of the Basic Flow.

Issue: 0.6 Error!
Reference source not
found.

Issue Date: 10/20/00

View Customer File

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Find a Customer (tab)

This screen will allow the USER to view the rental.

2.1.1 Find a Customer (tab)

Enterprise

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: Handling for:

last name:

first name:

claim number:

adj last name:

last date authorized:

modify:

status:

please choose:

come back, Fitzgerald, Neil.

ow please find the action items that require your attention.

The Action Items, click the column title of your chosen sorting method
ed by date, click "DATE RECEIVED")

RECEIVED	RENTER'S NAME	CLAIM NUMBER	ADJUSTER
01-00	Bowie, David	234587871	Fitzgerald, Neil
01-00	Weber, Andrew	754589877	Fitzgerald, Neil
15-00	(5) Invoices		Fitzgerald, Neil

4 Over

31 Not Invoiced

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View Customer File

2.1.2 Customer (tab)

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
last name	Input	20	Renter last name	Last name	
first name	Input	20	Renter's first name	First name	
claim number	input	30	Insurance claim number	Ins. Claim number	N/A.
adj. last name	Input	20	Adjuster's last name	Last name	N/A.
last date authorized:	Input	20	Last date authorized	LAST AUTH DAY	N/A.
status:	List Box	20	Contract Status	Status Code	N/A.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Search

When clicked, the will search for any records that match the criteria listed.

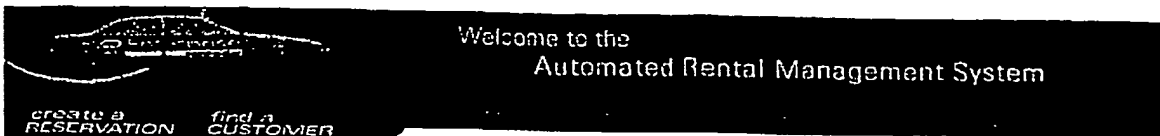
2.2 Customer File - Closed Items

This screen will allow the USER to view the rental when closed.

2.2.1 Screen Layout – Customer File - Closed Items

Issue: 0.6 Error!
Reference source not
found.
Issue Date: 10/20/00

[View Customer File](#)



Claims Office: 001 Handling for: Yourself
Customer File: for Bowie, David Claim No. 323232323232
Close

[Go to Invoice](#)

RENTER INFORMATION:

Bowie, David
1735 N. Paulina St.
Chicago, IL 60622
Renter Type: Claimant

Home: (773) 564-6054
Work: (773) 395-6200
Email: dbowie@zefer.com
Requested email confirmation

RENTAL INFORMATION:

Authorized Rental:
Authorized Class: Standard
Days/Rate: 3 days @ \$21.99/day
Current Class: Full-Size

Enterprise Rent-A-Car Location:
Enterprise Edgewater Branch
5400 N. Ashland
Chicago, IL 60622
773-334-5400

Rental Date: 03/28/2000
Start Date: 03/30/2000

CLAIM INFORMATION:

Claim Number: 323232323232323
Insured Name: Lalumandier, Craig
Owner's vehicle: GMC Suburban 1999
Date of Loss: 03/28/2000
Vehicle Condition: Non-Drivable

Repair Facility:
Elco Chevrolet
Chicago, IL 60621
(773)334-9832

NOTEBOOK:

Invoice Paid: 536.13 on 6/20/00
Message, Belanger, Hughes, 2/20/00
Note from Enterprise, Sarussi, Marty, 2/21/00
Extension Request, 2/24/00
Extension, 2/25/00

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Invoicing:

☐ Print Rental History too

[Use the "Print" button from your browser after clicking the "Printer-Friendly Version" button.]

RENTAL:

Enterprise Rent-A-Car Location:
6850 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

INVOICE:

Reference: PPGM 0073082
Invoice Date: 02/10/00
Federal ID: 4800791835

Authorized

Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

CLAIM:

Renter: Weber, Andrew
Claim Number: 5598754821
Claim Type: Claimant
Vehicle Condition: Non-Drivable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Actual Rental

Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:

20 @ \$22.99/day = \$459.80
Direct Bill Percent: 100%
Sales Tax (6%) = \$30.36
Total Charges: \$536.13
Amount Received: \$0.00
Total Due: \$536.13

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2.2.2 Customer File - Closed Items

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Actual Days:	Output	3	actual days rented	Item Quantity	Invoicing Section Only
@	Output	3	Actual Rate Rented	Item Rate	Invoicing Section - Actual Rental only
=	Output	8	Amount charged	Item Amount	Invoicing sections, Actual Rental only
Billed Period: _____ to _____ (____ days)	Output	30	Billing start date, end date and number of days	Item Quantity	Invoicing section only
	Output	3	Number of days authorized	Item Quantity	Invoicing, Actual Rental Section only
Sales Tax (____ %)	Output	3	Sales Tax	Item Description	Invoicing, Actual Rental section only
Billed Period: _____ to _____ (____ days)	Output	30	Billing start date, end date and number of days	Bill to End Date	Invoicing section only
Billed Period: _____ to _____ (____ days)	Output	30	Billing start date, end date and number of days	Bill to Start Date	Invoicing section only
Federal ID:	Output	12	Federal ID Number	Federal ID Number	Only shown in Invoicing sections
Invoice Date:	Output	10	Invoice Date	Record Add Date	Only used in the invoice sections.
Reference:	Output	32	Reference Number	Invoice Number	Only in the invoice sections
Amount Received	Output	8	Amount Received	Total Amount Received	Invoicing, Actual Rental sections only
Total Charges:	Output	8	Total Charges	Total Ticket Charges	Invoicing, Actual Rental Section only
Total Due:	Output	8	Total Due	Total Amount Due	Invoicing, Actual Rental sections only
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	
Authorized Period: _____ to _____ (____ days)	Output	30	Authorized Start Date	Start Date + End Date + Days authorized-detail	Only in invoicing sections
Date	Output	8	Message Creation Date	Add Date	N/A.
Message to Branch Location:	Output	50	Message Text	NOTE	
Notebook	Output	50	Message Text	NOTE	N/A.
Authorized Class:	Output	20	Car Class Name	Vehicle Class	
Current Class:	Output	20	Car Class Name	Vehicle Class	N/A.
Claim Number:	Output	11	Claim Number	Insurance Claim Number	
Claim No.	Output	30	Claim Number	Insurance Claim Number	
Daily Rate/Max. Dollars	Output	10	Daily Policy Rate and Maximum Policy Rate	Dollars Per Day Covered + Max \$ Covered	Invoicing section only
Direct Bill Percent	Output	4	Direct Bill Percent	Bill To %	Invoicing sections only
Direct Bill Percent	Output	8	Direct Bill Percent	Bill To %	Invoicing sections Actual Rental only
	Output	30	Rental Location Branch Name	Rental Location	
Days/Rate	Output	6	Rental Location Rate and number of days	Number Of Days Authorized	N/A.

Issue: 0.6 Error!
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 found.
 Issue Date: 10/20/00

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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Days/Rate	Output	6	Rental Location Rate and number of days	Vehicle Rate	N/A.
@	Output	7	Rental Rate per day	Rate Charged	Invoicing section only
Rental Period: _____ to _____ (____ days)	Output	30	Rental Start	Start Date + End Date + CALCULATED	Invoicing sections only
Rental Date	Output	10	Rental Start Date	Start Date	
Start Date	Output	10	Start Date of rental	Start Date	
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date Of Loss	
	Output	20	Renter City Name	City	
	Output	10	Renter Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Renter Email:	Output	20	Renter's Email	Day Phone	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extensin	
Renter Infomation:	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter Name:	Output	30	Renter's Name	First Name + Last Name	
Owner's Vehicle	Output	4	Renter's Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
Phone Number:	Output	16	Body Shop Phone Number	Telephone Number	
	Output	20	Repair Faciity City	City	
	Output	3	Repair Facility State	State	
	Output	7	Repair Facility Zip Code	Zip Code	
=	Output	10	Amount charged	CALCULATED	Invoicing sections only

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 found.
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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Total authorized Includes Tax & Surcharge	Output	8	Total authorized amount	CALCULATED	Invoicing sections only
Renter Type	Output	15	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	
Vehicle Condition	Output	15	Loss Type	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 Previous

When clicked, the USER will be taken back to the use case from where they came

2.2.3.2 Printer Friendly Version

When clicked, the system will bring up a screen that only shows the particular invoice for which you clicked this button. The USER may print from this screen

2.2.3.3 Top of page

When clicked, the USER will be taken to the top of the current page.

2.3 Search Results

This screen will allow the USER to view the rental when closed.

2.3.1 Screen Layout – Search Results

View Customer File



Enterprise

create a
RESERVATION

find a
CUSTOMER

Welcome to the
Automated Rental Management System

Claims Office: 001

Handling for:	<div style="border: 1px solid black; padding: 2px;"> Yourself </div>
---------------	---

**There was more than one possible match for the items you searched for.
Please choose from the results below or [Search Again](#)**

Search Results: You requested a search for: Abrahm, Alice
Adjuster Name: Summer

Item	Quantity	Unit Price	Total Price	Total Price
1.000	1.000	1.000	1.000	1.000
2.000	2.000	2.000	2.000	2.000
3.000	3.000	3.000	3.000	3.000
4.000	4.000	4.000	4.000	4.000
5.000	5.000	5.000	5.000	5.000
6.000	6.000	6.000	6.000	6.000
7.000	7.000	7.000	7.000	7.000
8.000	8.000	8.000	8.000	8.000
9.000	9.000	9.000	9.000	9.000
10.000	10.000	10.000	10.000	10.000

Would you like another search?

Last Name: Abraham

First Name: Alice

Claim Number:

Confirmation Number:

Adjuster Last Name: Summer

Last Date Authorized: January 1 2000

Status: Closed

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found.

Issue Date: 10/20/00

View Customer File

2.3.2 Search Results

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Last Date	Output	10	Authorization Date		
Status	List Box	10	Contract Status	Status Code	
last date authorized	Input	5	Last Day Authorized	LAST AUT DAY	
adj. last name	Input	15	Adjuster Last Name	Last Name	
Adjuster Name:	Output	20	Adjuster Name	First Nam + Last Name	
Handling for:	List Box	15	Handling for Adjuster Name	First Name + Last Name	
File Type	Output	15	Status	Status Description	
confirmation number	Input	52	Confirmation Number	Transmission Code	
Claim Number	Output	30	Claim Number	Insurance Claim Number	Populated by the data matching the search criteria
claim number	Input	30	claim number	Insurance Claim Number	
Loss Date	Output	10	Date of Loss	Date Of Loss	
first name	Input	15	Renter's First Name	First Name	
last name	Input	15	Renter's Last Name	Last Name	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	Returned data from the search criteria
Claims Office:	List Box	5	Office ID	external organization abbreviated name	
You requested a search for:	Output	30	Search Criteria	NOT STORED	<p>This field will be populated by the criteria used to search for a particular record.</p> <p>This field may be a Last Name, First Name, Claim Numer, Confirmation Number, Adjuster Last Name or Status.</p> <p>The data in this fiel</p>

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity

2.3.3.1 Search Again

When clicked, the system will re-search the database after the USER has entered new or additional criteria.

2.3.3.2 Top of page

When clicked, the USER will be taken to the top of the current page.

Issue: 0.6 Error!
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View Customer File

2.3.3.3 View Next 10>>>

When clicked, the system will display the next 10 items that match the search criteria

3. Application Operations

4. Data Fields**4.1 Data Field Definition**

This section includes a definition of all data fields included in the functional specification

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

Issue: 0.6 Error!
Reference source not
found.

View Customer File

Issue Date: 10/20/00

4.1.6 Bill to End Date

Entity	A4 Invoice Header
Column Name	I1BTDT
Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.7 Bill to Start Date

Entity	A4 Invoice Header
Column Name	I1SRDT
Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.8 Branch

Entity	ARM: Rental Location Master
Column Name	Branch
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.9 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)

View Customer File

Attribute Definition	
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4.1.12 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.13 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.14 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.15 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.16 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.17 Days authorized-detail

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEAUDY
Label Name	Days authorized-detail
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.18 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZSPDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.19 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.20 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier.
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies

4.1.21 Federal ID Number

Entity	A4 Invoice Header
Column Name	IIFETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

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4.1.22 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.23 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.24 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.25 Group

Entity	ARM: Rental Location Master
Column Name	Group
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.26 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.27 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)

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Attribute Definition	
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4.1.28 LAST AUT DAY

Entity	A4 Cross Reference
Column Name	X4LADT
Label Name	LAST AUT DAY
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.30 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.31 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.32 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

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4.1.33 loss type description

Entity	LOSS TYPE
Column Name	loss_type_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.34 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.35 message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)
Attribute Definition	The message ecars indicator indicates whether the message is sent/received from the ecars system.

4.1.36 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.37 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.38 Rate Charged

Entity	ARM: Authorization(Claim Info)
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Column Name	AZRTCH
Label Name	Rate Charged
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.39 Record Add Date

Entity	A4 Invoice Header
Column Name	IIADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.41 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.42 Renter Make/Model

Entity	ARM: Renter Detail
Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.43 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

ARMS Redesign Project - Release 1.0

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4.1.44 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.45 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Renters Night Phone Extensin

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extensin
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.47 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.49 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT

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View Customer File

Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.51 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.52 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.53 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.54 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

ARMS Redesign Project - Release 1.0

Issue: 0.6 Error!
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found.

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Issue Date: 10/20/00

4.1.55 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.56 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.57 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.59 Transmission Code

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NETRCD
Label Name	Transmission Code
System Name	
Data Type	CHAR(1)
Attribute Definition	

4.1.60 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)

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Attribute Definition	
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4.1.61 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.62 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.63 Zip Code

Entity	ARM: Renter Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.64 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification Handle Unapproved Invoices

Version 1.1

Last Saved: 8/14/00 1:20 PM

ARMS Redesign Project - Release 1.0
Handle Unapproved Invoices

Issue: 1.1
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
June 9, 2000	1.0	Added data field information	Cindy Bastean
June 12, 2000	1.0	Made the following Changes: <ul style="list-style-type: none"> • <i>Redefined the process based on iteration one feedback.</i> • <i>Removed invoice printing as part of the Basic Flow and added it to the Alternate Flows</i> • <i>Detailed the Bulk Payment Reconciliation Process</i> • <i>Added Alternate Flow to handle when the number of invoices on the Payment List exceeds the number that can be bulk-paid by the user's system.</i> 	Brad Reel
June 13, 2000	1.1	Removed reconciliation process from the specification. Reconciliation was deemed too complex to incorporate into the application at this time.	Brad Reel
June 29, 2000	1.1	Updated screen field and data field information	Cindy Bastean
June 29, 2000	1.1	Updated information throughout sections 1 & 2.	Brad Reel
September 15, 2000	1.1	Updated information throughout sections	Brian Weingart

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1. Handle Unapproved Invoices Use Case

1.1 Brief Description

The Handle Unapproved Invoices use case describes how the Adjuster would review invoices and approve them for payment. The use case will then describe the processes the Adjuster will follow in the case where the Adjuster is the one that is actually paying the invoice.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this case to approve and either pay unapproved invoices or send them on to a PROCESSOR for payment.

1.3 Pre-Conditions

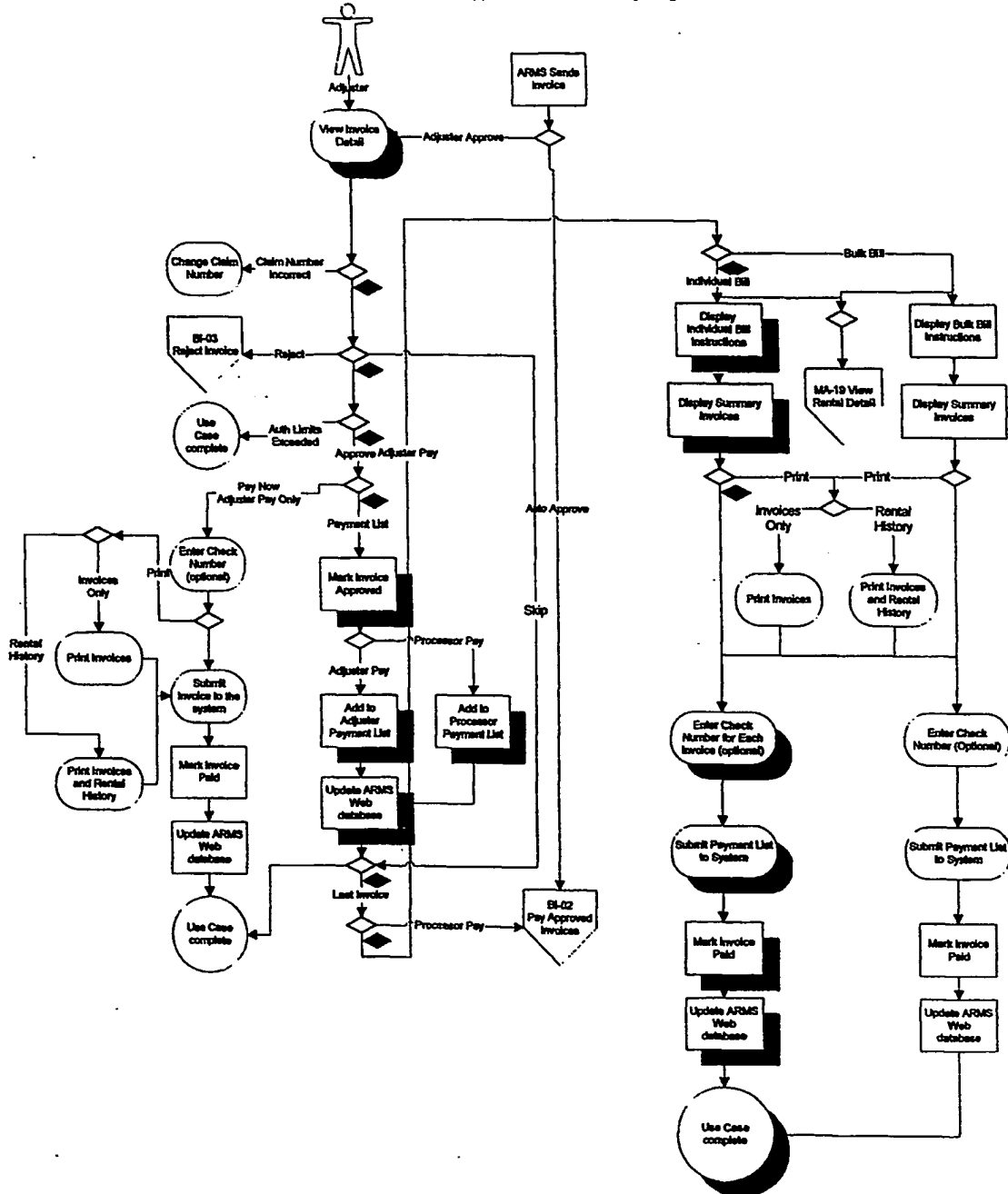
- The ADJUSTER must be logged into the ARMS Web system.
- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be able to handle invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to approve and pay invoices.

1.4.1 Activity Diagram

Handle Unapproved Invoices Activity Diagram



9/13/00

Y:\APPS\ARMSWebApplication\@dkb\ARMS WebRelease One\BI-Billing and Invoicing\BI-01-Handle Unapproved Invoices\ACTIVITY DIAGRAM\BI-01-V1-ACTIVITY DIAGRAM.VSD

1.4.2 Basic Flow

1. The ADJUSTER will view the detail of the invoice.
2. If the ADJUSTER chooses to pay the invoice immediately, execute subflow 1.4.2.3 – Pay a Single Invoice. Otherwise continue the Basic Flow.
3. The ADJUSTER will approve the invoice.
4. The system will mark the invoice approved.
5. If the ADJUSTER pays their invoices, then the invoice will be added to their payment list. If a PROCESSOR pays their invoices, then the invoice will be added to the PROCESSOR'S payment list.
6. The system will update the ARMS Web database.
7. If this is the last or only invoice in the action items list, then continue to step eight of the Basic Flow. Otherwise, the use case ends.
8. The system will check to see if the ADJUSTER'S office is set up for individual payment or bulk payment.
 - If the ADJUSTER'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
 - If the ADJUSTER'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.

1.4.2.1 Individual Payment List

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices just approved by the ADJUSTER.
2. For each invoice on the payment list, the ADJUSTER may enter the associated check number.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Payment List

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices just approved by the ADJUSTER.
2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.3 Pay a Single Invoice

1. The ADJUSTER may enter the check number for the invoice being paid.
2. The system will mark the invoice paid
3. The system will update the ARMS Web database.
4. This ends the use case.

1.4.3 Alternative Flows**1.4.3.1 Selected Action Item is Payment List**

At step one of the Basic Flow, if the action item being worked is the "Payment List" action item, then the ADJUSTER will be taken immediately to step one of section 1.4.2.1 if they are set up for individual pay, or step one of section 1.4.2.2 if they are set up for bulk pay.

1.4.3.2 Reject an Invoice

At step one in the Basic Flow, the ADJUSTER may choose to reject the invoice. The rejection process is executed using extension point BI-03 – Reject an Invoice.

1.4.3.3 View Customer File

At Individual Payment List or Bulk Payment List, the ADJUSTER may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 – View Customer File.

1.4.3.4 Print a Single Invoice

At step one in the Basic Flow, the ADJUSTER may choose to print the invoice. If they so choose, they may also print the rental history. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of the Basic Flow by hitting the “back” button on the web browser.

1.4.3.5 Print an Invoice List

At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the ADJUSTER may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of section 1.4.2.1 if the ADJUSTER is set up for Individual Pay, or section 1.4.2.2 if the ADJUSTER is set up for Bulk Pay.

1.4.3.6 Skip Invoice

At step three in the Basic Flow, the ADJUSTER may choose to skip the invoice in question and handle it at a later time. The ADJUSTER will be taken to the next action item on their action item list. The status of the invoice should not be changed by the ARMS Web system.

1.4.3.7 Payment by PROCESSOR

If the ADJUSTER is only responsible for approving the invoice, then, after step four in the Basic Flow, the system will make the approved invoice an action item for the PROCESSOR(S) responsible for paying the ADJUSTER'S invoices. This ends the use case. Payment by PROCESSOR is handled via Functional Specification BI-02 – Pay Approved Invoices.

1.4.3.8 Amount Being Approved Exceeds USER'S Authorization Limits

When a USER attempts to approve an invoice for payment, the system will check to see if the amount due on the invoice is greater than the USER'S authorization amount. If the amount due is greater than the USER'S limit, the system will not allow the approval and will request that the USER transfer the invoice to another user with authorization limits that are great enough to approve the invoice.

1.4.3.9 Change Claim Number

At step one in the Basic Flow, if the status is “rejected” and if the profile allows, the ADJUSTER may choose to change the claim number associated with an invoice. Once a claim number has been updated, the ADJUSTER will continue with step four of the basic

1.5 Post-Conditions

- If the use case was successful and the ADJUSTER is responsible for paying invoices, the approved invoices should be marked as paid in the ARMS Web system.
- If the use case was successful and the ADJUSTER is only responsible for approving invoices, then the approved invoices should be marked as adjuster approved in the ARMS Web system.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 ARMS Web Routes Invoices

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval. The payment method may be either bulk or individual payment.

1.6.2 Includes Tax and Surcharge Data Field

On the invoice next to the authorized amount, the field "Includes Tax and Surcharge" will be displayed next to the Authorized total if that total should include taxes and surcharges. This will occur in two events. For an insured, if the authorized amount is less than the policy daily amount, the authorized total will include taxes and surcharges up to the policy daily amount. For a claimant, the authorized amount will always include taxes and surcharges, without limit, until the rental is terminated by the ADJUSTER.

1.6.3 Data Fields to Assist with Future Releases or Customer Integration

It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

1.7 Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.7.1 BI-03-Reject an Invoice

The Reject an Invoice Functional Specification is used to reject a specific invoice to Enterprise due to missing required information or an incorrect amount on the bill. Upon completion of the Reject an Invoice Functional Specification, the ADJUSTER should be returned to step six of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system. The rejected invoice should be marked as rejected by the system. The Handle Unapproved Invoices Functional Specification will only allow for one invoice to be rejected at a time.

1.7.2 MA-19-View Rental Detail

The View Rental Detail Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Rental Detail Functional Specification, the ADJUSTER should be returned to step four of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system.

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.


2.1 Invoicing – Individual Payment

This screen will allow the user to choose to view the invoice selected in the action items list. They will choose to either pay this invoice immediately (pay now), or choose to add it to a payment list for payment later in conjunction with all their other invoices. They may also choose to print the invoice from this page. They may also optionally choose to print the rental history. The user may choose to change the claim number. Finally the user may choose to skip this invoice and leave it until later for review.

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2.1.1 Invoicing – Individual Payment




Welcome to the
Automated Rental Management System

create a
RESERVATION
find a
CUSTOMER

Claims Office: 001
Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT



RENTAL:
Rental Branch Location:
6850 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

INVOICE:
Reference: PPGM 0073062
Invoice Date: 02/10/00
Federal ID: 4800791835

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

CLAIM:
Renter: Weber, Andrew
Claim Number: 5598754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
20 @ \$22.99/day = \$505.78
Direct Bill Percent: 100%
Total Charges: \$536.13
Amount Received: \$0.00
Total Due: \$536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

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Issue Date: 10/20/00

2.1.2 Invoicing – Individual Payment Screen Design

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
	Output	15,2	Line Item Charge Amount	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges that apply.
Claim No:	Input	15	Claim Number	Insurance Claim Number	
Invoice Date:	Output	10	Invoice Date (Ecar's Ticket Date)	Record Add Date	
Reference:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket Number
Please include this reference number on your check	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Federal ID	Output	30	Location's Federal ID	Federal ID Number	
Amount Received	Output	15,2	Amount of rental charges received	Total Amount Received	
Total Due:	Input	15,2	Total Amount Due from Ins. Company	Total Amount Due	
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	150	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for this reservation.
to	Output	10	Authorization Termination Date	End Date	
to	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill To %	
Direct Bill Percent:	Output	15,0	Authorized Bill percentage	Bill To %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
Billed Period:	Output	10	Authorized Start Date	Start Date	
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with the claim number currently on the authorization.
to	Output	10	Close date of Rental Ticket	End Date	

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Policy: Daily Rate/Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	
Policy: Daily Rate/Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max \$ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	
Insured Name	Output	30	Insured's Name	First Name + Last Name	
For	Output	30	Insured's name	First Name + Last Name	
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
	Output	30	Rental Location's Mailing City, State, and Zip	City	
	Output	30	Rental Location's Mailing City, State, and Zip	State	
	Output	30	Rental Location's Mailing City, State, and Zip	Zip Code	
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	This field is repeated for each invoice in the payment list.
Renter	Output	30	Renter's Name	First Name + Last Name	
(Output	5	Number of Authorized Days	CALCULATED	
(Output	5	Number of authorized days	CALCULATED	
(Output	5	Number of Rental Days	CALCULATED	
Total Due	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges - Amount Received
Number of Authorized Dates + "@" + authorized Daily Rate + "/day="	Output	15,2	Total Authorized Amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total authorized Amount with Tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + Calculated Tax and surcharge

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Number of Rental Days + "@" + ECAR's Ticket Daily Rate + "/day="	Output	15,2	Total Ticket Rental Amount before tax and surcharg	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate
Claim Type:	Output	10	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	20	Loss Type	loss type description	
Rental	Output	30	Rental Location's Accounting Name	accounting name	
Send Payment To:	Output	30	Rental Location's Accounting Name	accounting name	
Check Number for you payment:	Input	20	Check Number	check number	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.1.3.2 REJECT

When clicked, the user will be taken to the Reject Invoice process.

2.1.3.3 PAY NOW

When clicked, the system will edit the current information. If the edit passes, the invoice will be marked as paid and the data files updated. If the validation fails, the user will be returned to the current screen with the errors highlighted.

2.1.3.3.1 The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.

2.1.3.4 ADD TO PAYMENT LIST

When clicked, the system will edit the current information for check number and claim number. If the edit passes, the invoice will be marked as approved and will be added to the ADJUSTER'S payment list and the user will be returned to the Review List process.

2.1.3.5 SKIP>>

When clicked, the user will be advanced to the next action item to be processed and the current invoice will remain unchanged (un-approved).

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2.1.3.6 Top of Pag

When clicked, the user will be taken to the top of the current invoice page.

2.1.3.7 Transfer File

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice. The USER may then choose one user from this list to which they may transfer the file.

2.1.3.8 Policy Information

Policy Information will only be shown under the Authorized Section if the claim type is NOT claimant.


2.2 Invoicing - Approval

This screen will allow the user to choose to view the invoice selected in the action items list. They may choose to approve the invoice payment. This will add the invoice to the PROCESSOR(S) that are responsible for paying the ADJUSTER'S invoices. The user may also choose to skip this invoice and leave it until later for review. They may choose to print the invoice from this page. They may also optionally choose to print the rental history. Finally, the user may choose to change the claim number.

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2.2.1 Screen Layout – invoicingApproval.shtml




Welcome to the
Automated Rental Management System

create a
RESERVATION
find a
CUSTOMER

Claims Office: 001 Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT



RENTAL:
Rental Branch Location:
6850 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
20 @ \$22.99/day = \$505.78
Direct Bill Percent: 100%
Total Charges: \$536.13
Amount Received: \$0.00
Total Due: \$536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

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INVOICE:
Reference: PPGM 0073082
Invoice Date: 02/10/00
Federal ID: 4800791835

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

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2.2.2 Invoicing Approval

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	152	Line item Charge Amount	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges that apply.
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
Claim No:	Output	15	Claim Number	Insurance Claim Number	
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization.
To	Output	10	Close Date of billing of Rental Ticket	Bill to End Date	
Invoice Date:	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	
Reference	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Billed Period	Output	10	Start date of billing of Rental Ticket	Bill to Start Date	
Amount Received:	Output	15,2	Amount of rental received.	Total Amount Received	
Total Due	Output	15,2	Total amount due from Ins. Company	Total Amount Due	
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	50	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for a reservation
To	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent:	Output	15,0	Authorized Bill percentage	Bill To %	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill To %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
To	Output	10	Close Date of Rental Ticket	End Date	
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max \$ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	
Insured Name:	Output	30	Insured's name	First Name + Last Name	
For:	Output	30	Insured's Name	First Name + Last Name	Renter's Last Name + Renter's First Name
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	Mailing City + Mailing State + Mailing Zip
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
Date of loss:	Output	20	Date of loss	Date Of Loss	
Renter	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
(Output	5	Number of Authorized Days	CALCULATED	Total number of authorized rental days
(Output	5	Number of Billed Days	CALCULATED	
(Output	5	Number of Rental Days	CALCULATED	Total number of authorized Rental Days
Total Due:	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges - Amount Received
Number of Authorized Days + "@" + Authorized Daily Rate + "/day="	Output	15,2	Total authorized amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total Authorized Amount with tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + (Calculated Tax and surcharge)
Number of Rental Days + "@" + ECAR's Ticket Daily Rate + "/day="	Output	15,2	Total Ticket Rental Amount before tax and surcharge	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate
Claim Type:	Output	10	Claim Type	claim type description	Claimant, Insured, etc.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Rental	Output	30	Rental Location's Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 *PRINTER FRIENDLY PAGE*

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.2.3.2 *REJECT*

When clicked, the user will be taken to the Reject Invoice process.

2.2.3.3 *APPROVE FOR PAYMENT*

When clicked, the currently displayed invoice status will be marked as approved and the user will be taken to the next Action Item.

- The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.
- Another adjuster has not already approved the invoice.

2.2.3.4 *SKIP>>*

When clicked, the user will be advanced to the next selected action item to be processed and the current invoice will remain unchanged (un-approved).

2.2.3.5 *Top of Page*

When clicked, the user will be taken to the top of the current invoice page.

2.2.3.6 *Transfer File*

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice. The USER may then choose one user from this list to which they may transfer the file.

2.2.3.7 *Policy Information*

Policy Information will only be shown under the Authorized Section if the claim type is NOT claimant.


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2.3 Individual Payment List

This screen provides the user with information on what the system expects them to do, and requests a check number that will be used to pay each invoice. The user may also choose to print the invoices, and optionally print the rental history in addition to the invoices. The user may choose not to process the payment list at this time, in which case the payment list will be added to the user's action items list.

2.3.1 Screen Layout -invoicingPymtList.shtml



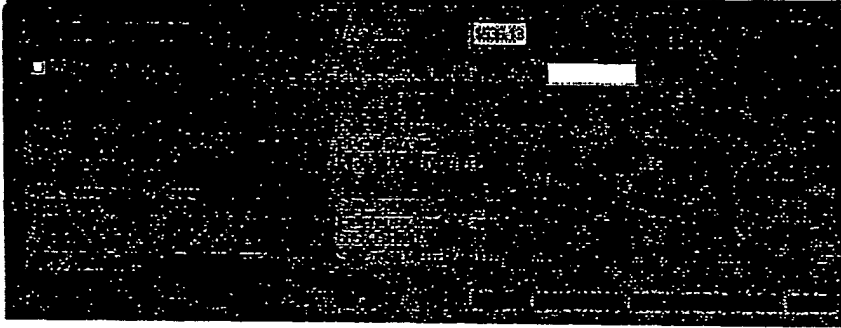
Welcome to the
Automated Rental Management System

create a
RESERVATION
find a
CUSTOMER

Claims Office: 001
Handling for: Yourself

Invoicing
for Weber, Andrew Claim no. 75584332-001

INDIVIDUAL PAYMENT



RENTAL:
Rental Branch Location:
6650 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0294

Authorized
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
20 @ \$22.99/day = \$505.78
Direct Bill Percent: 100%
Total Charges: \$536.13
Amount Received: \$0.00
Total Due: \$536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

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INVOICE:
Reference: PPGM 0073082
Invoice Date: 02/10/00
Federal ID: 4800791835

CLAIM:
Renter: Weber, Andrew
Claim Number: 5598754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

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2.3.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoices.

2.3.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.3.3.3 PAY LATER

When clicked, the user will be returned to view list and the requests will remain unchanged.

2.3.3.4 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

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Issue: 1.1
Issue Date: 10/20/00

2.4 Bulk Payment List

This screen provides the user with information on what the system expects them to do, and requests a check number that will be used to pay each invoice. The user may also choose to print the invoices, and optionally print the rental history in addition to the invoices. The user may choose not to process the payment list at this time, in which case the payment list will be added to the user's action items list.

2.4.1 Screen Layout – Bulk Payment List

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

Invoicing for Weber, Andrew Claim no. 765849322-001
INDIVIDUAL PAYMENT

RENTAL:
Rental Branch Location:
6850 Ladue Rd.
Saint Louis, MO 631240001
(314) 512-0234

INVOICE:
Reference: PPGM 0073062
Invoice Date: 02/10/00
Federal ID: 4800791835

Authorized:
Authorized Period: 02/10/00 to 03/01/00 (20 days)
Days: 20
Rate: 22.99
Direct Bill Percent: 100%
Total authorized: 459.8 Plus Tax & Surcharges

CLAIM:
Renter: Weber, Andrew
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Non-Driveable
Date of Loss: 02/05/00
Insured Name: Smith, Bob

Actual Rental
Rental Period: 02/10/00 to 03/01/00 (20 days)
Billed Period: 02/10/00 to 03/01/00 (20 days)
Actual Days:
20 @ \$22.99/day = \$505.78
Direct Bill Percent 100%
Total Charges: \$536.13
Amount Received: \$0.00
Total Due: \$536.13

NOTEBOOK:
Reservation for Weber, Andrew 2/21/00
Diary Note, Marty Sarussi, 2/21/00
Extension request, 2/24/00

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2.4.2 Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + Sate + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

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Issue Date: 10/20/00

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoices.

2.4.3.2 CONFIRM PAYMENT

When clicked, the system will mark the reservation as paid and update the database. The update will be passed to the Arms system. The user will then be returned to the next action item or the Action Items screen if no more action items exist.

2.4.3.3 PAY LATER

When clicked, the user will be returned to Action Items and the request will remain unchanged.

2.4.3.4 Top of Page

When clicked, the user will be taken to the top of the payment list.

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3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Unapproved Invoices (Adjuster Id)

The build unapproved invoice list operation finds all the invoices, that need approval, for the specified adjuster.

3.2 Approve Invoice (Invoice Number)

The approve invoice operation marks the specified invoice as approved. This invoice is now ready to be paid.

3.3 Get Approved Invoices (Adjuster Id)

The build approved invoice list operation finds all the approved invoices for the specified adjuster.

3.4 Get Invoice Detail (Invoice Number)

The build invoice detail operation gets the relevant invoice information for the specified invoice number.

3.5 Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

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4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 action item assigned date

Entity	ACTION ITEM
Column Name	actn_item_assn_dte
Label Name	action item assigned date:
System Name	AITMASGNDT
Data Type	DATE
Attribute Definition	The action item assigned date is the date the action item was established and assigned to an administrator or adjustor.

4.1.3 action item complete date

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	AITMCMPPLDT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.4 action item effective date

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

4.1.5 action item status code

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

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4.1.6 action item type code

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of

4.1.7 action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)
Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an

4.1.8 action related adjustor code

Entity	ACTION ITEM
Column Name	actn_rel_adjr_cde
Label Name	Adjustor Code
System Name	ARADJRCDE
Data Type	CHAR(10)
Attribute Definition	The action related adjustor code is the adjustor code of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.

4.1.9 action related company identifier

Entity	ACTION ITEM
Column Name	actn_rel_cmpy_id
Label Name	ARMS Profile ID
System Name	ARCOMPYID
Data Type	CHAR(5)
Attribute Definition	The action related company identifier is the company identifier of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.

4.1.10 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADLI
Label Name	

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System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.11 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.12 Adjustor Code

Entity	ARM: Adjustor Master
Column Name	ALAACD
Label Name	Adjustor Code
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.13 ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.

4.1.14 ARMS Profile ID

Entity	ARM: Adjustor Master
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.15 assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

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4.1.16 assigned to company identifier

Entity	ACTION ITEM
Column Name	assign_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

4.1.17 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.18 Bill to End Date

Entity	A4 Invoice Header
Column Name	I1BTDT
Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.19 Bill to Start Date

Entity	A4 Invoice Header
Column Name	I1SRDT
Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.20 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number.
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

4.1.21 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

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4.1.22 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.23 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPIID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.24 company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lvl_cde
Label Name	company structure level code:
System Name	CMPSLVLCD
Data Type	DEC(3,0)
Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.

4.1.25 Customer Transaction ID

Entity	ACTION ITEM
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.26 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

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4.1.27 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZSPDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.28 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.30 external organization identifier

Entity	ALTERNATE ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.31 Federal ID Number

Entity	A4 Invoice Header
Column Name	IIFETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.32 First Name

Entity	ARM: Adjustor Master
--------	----------------------

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Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.33 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.34 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.35 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.36 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.37 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor coder is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS

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	Web application.
--	------------------

4.1.38 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier.
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.39 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	IICLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.40 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.41 Invoice Number

Entity	A4 Invoice Header
Column Name	IINNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT\$\$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.43 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS

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Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.44 Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity
System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.45 Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.46 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.47 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.48 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.49 loss type description

Entity	LOSS TYPE
--------	-----------

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Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.50 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.51 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.52 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.53 Record Add Date

Entity	A4 Invoice Header
Column Name	IIADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.54 related office identifier

Entity	ACTION ITEM
Column Name	rel_ofc_id
Label Name	related office identifier:
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the

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	action item.
--	--------------

4.1.55 Remittance Reference

Entity	A4 Remit Reference No.
Column Name	Q5RMNO
Label Name	Remittance Reference #
System Name	
Data Type	NUMERIC(6)
Attribute Definition	

4.1.56 Request Type

Entity	ACTION ITEM TYPE
Column Name	XURSTP
Label Name	Request Type
System Name	XURSTP
Data Type	CHAR(1)
Attribute Definition	The request type is a code from the ARMS system which identifies whether adjusor action is necessary for an authorization and what type of action.

4.1.57 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.58 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.59 Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)
Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.

4.1.60 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO

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Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.61 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.62 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.63 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	I3OT\$\$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.64 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.65 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.66 Zip Code

Entity	ARM: Rental Location Master
--------	-----------------------------

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Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

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5. Questions and Answers

Issue Number: 256

Question: The calculation for authorized limit when displaying the invoice detail does not take bill to percent into account when all the following conditions are true:

Policy Maximum = 0

Policy Daily > 0

Vehicle Rate > 0

Vehicle Rate < Policy Daily

or all the following conditions are true:

Policy Maximum > 0

Policy Daily = 0

Vehicle Rate > 0

In all other cases, the amount is multiplied by the bill to percent to get the authorized limit.
Is this calculation correct ?

Status: Pending

Resolution: 3-14-00, DSE-Need to follow up with author to get an further understanding of question.

3-23-00, Issue Mtg, Will get addressed in current state and fix.

Issue Number: 257

Question: This is a presentation issue. The adjuster name on the invoice detail screen will not show up in certain cases. This code is in the *INZSR sub routine and needs some investigation of scenarios to determine the exact flaw.

Status: Closed - Resolved

Resolution: 3-14-00, DSE-Need to follow up with author to get an further understanding of question.

Enterprise Rent-A-Car

Functional Design Specification Pay Approved Invoices (Processor Pay)

Version 1.0

Last Saved: 6/29/00 8:56 AM

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Pay Approved Invoices

Issue: 1.0
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
April 21, 2000	0.1	Initial Draft	Brad Reel
April 24, 2000	0.2	Revised to reflect initial team review	Brad Reel
May 9, 2000	0.3	Updated sections and removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 10, 2000	0.4	Made screen changed and added to document	Debi Ealick
June 7, 2000	0.5	Added Data Fields and new Screen Fields Table	Cindy Bastean
June 13, 2000	1.0	Revising for iteration two	Brad Reel
June 29, 2000	1.0	Revised Data Field and Screen Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various sections	Brad Reel
September 15, 2000	1.1	Updated various sections	Brian Weingart

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Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Yourself

Invoicing:
BULK PAYMENT LIST GEICO

<p>Weber, Andrew</p> <p>Invoice 1 Invoice: PPGM 0073082 Federal ID: 48-0791835 Invoice Date: 10/22/99 Claim Claim Number: 5698754821 Claim Type: Claimant Vehicle Condition: Driveable Date Of Loss: 10/10/99 Adjuster: Fitzgerald, Neil Claims Office: 001</p>	<p>Rental Branch Location 6850 Ladue Rd St. Louis, Mo 63124-4001 314-512-0294</p> <p>Total Due: \$512.36</p>
--	--

<p>Crystal, Billy</p> <p>Invoice 2 Invoice: PPGM 0073082 Federal ID: 48-0791835 Invoice Date: 10/22/99 Claim Claim Number: 5698754821 Claim Type: Claimant Vehicle Condition: Driveable Date Of Loss: 10/10/99 Adjuster: Fitzgerald, Neil Claims Office: 001</p>	<p>Rental Branch Location 234 Bonhomme St. Clayton, Mo 63100-2001 314-539-9899</p> <p>Total Due: \$512.36</p>
---	---

• Please include this reference # on your check:
 567347585
 • Remit to: Enterprise Rent-a-Car
 • 2 invoices
 Total Amount: \$536.13
 • Enter the check number for your payment here:

 • Send Payment to:
 Enterprise Rent-a-Car
 6850 Ladue Rd
 St. Louis, Mo 63124-0001

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1. Pay Approved Invoices Use Case

1.1 Brief Description

The Pay Approved Invoices use case describes how the PROCESSOR would review and pay invoices in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **PROCESSOR** – The PROCESSOR will use this use case to pay approved invoices.

1.3 Pre-Conditions

- The PROCESSOR must be logged into the ARMS Web system.
- The PROCESSOR'S office must be set up to handle processor payment of invoices.
- The PROCESSOR must be authorized to handle invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for a PROCESSOR to review and pay invoices.

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1.4.1 Activity Diagram

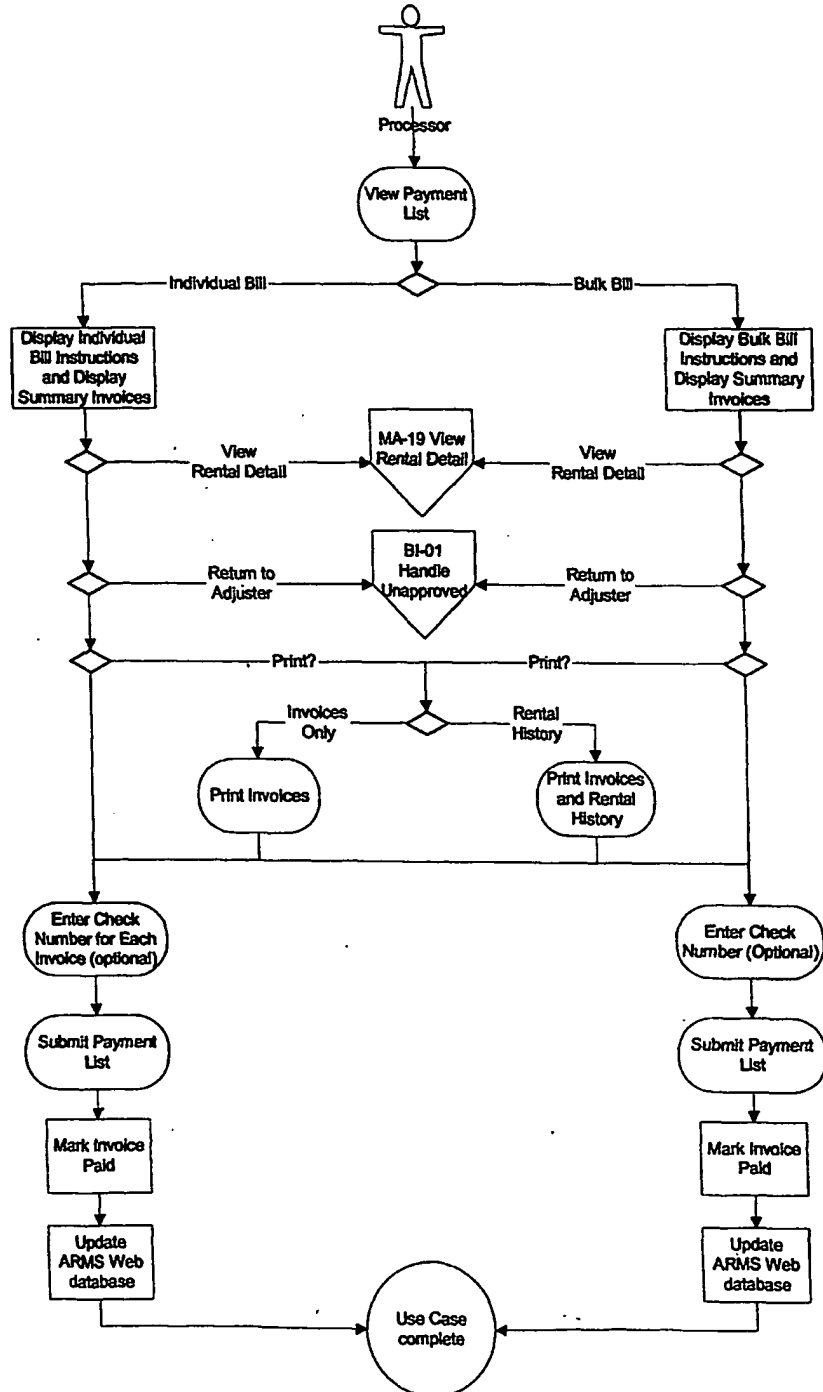
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Pay Approved Invoices Activity Diagram



\\FSCORP00\corp_public\APPS\#ARMSWebApplication\@dkb\ARMS Web\Release One\BI-Billing and Invoicing\BI-02-Pay Approved Invoices\ACTIVITY DIAGRAMS\BI-02-ACTIVITY DIAGRAM.VSD

9/15/00

1.4.2 Basic Flow

1. The PROCESSOR will view their payment list.
2. The system will check to see if the PROCESSOR'S office is set up for individual payment or bulk payment.
 - If the PROCESSOR'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
 - If the PROCESSOR'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.

1.4.2.1 Individual Pay

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices on the PROCESSOR'S payment list.
2. For each invoice on the payment list, the PROCESSOR may enter the associated check number.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Pay

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices on the PROCESSOR'S payment list.
2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 View Customer File

At step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 – View Customer File.

1.4.3.2 Return an Invoice

At step one of Section 1.4.2.1, Individual Pay or Section 1.4.2.2, Bulk Pay the PROCESSOR may choose to return any invoice to the ADJUSTER. The PROCESSOR may enter a message to explain why they returned the invoice. The returned invoice should be given a status of returned invoice. The invoice will then become an action item for the owning ADJUSTER to review and correct.

1.4.3.3 Print an Invoice List

At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the PROCESSOR will choose to print via their browser window. Upon printing, the PROCESSOR will return to the step one of section 1.4.2.1 if the PROCESSOR is set up for Individual Pay, or section 1.4.2.2 if the PROCESSOR is set up for Bulk Pay.

1.5 Post-Conditions

- If the use case was successful the accepted invoices should be marked as paid in the ARMS Web

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system.

- If the use case was unsuccessful, the system state is unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 ARMS Web Routes Invoices

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval.

1.6.2 Data Fields to Assist with Future Releases or Customer Integration

It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

1.6.3 Claim Number is Editable on the Invoice

If a company is set up for EDI transmission of invoices to the company's claim system, that company must have the ability to change the claim number on the invoice.

1.7 Extension Points

1.7.1 MA-19-View Customer File

The View Customer File Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Customer File Functional Specification, the ADJUSTER should be returned to step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system.

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.


2.1 Invoicing - Individual Payment List

This screen will allow the user to enter a check number for each invoice and notify Enterprise that they have processed the payment.

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2.1.1 Individual Payment List




Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER CLAIM NO. TEST

Claims Office: 001 Handling for: Yourself

Invoicing:
INDIVIDUAL PAYMENT LIST



Weber, Andrew **Invoice 1**

Invoice: PPGM 0073082
Federal ID: 48-0791835
Invoice Date: 10/22/99
Claim
Claim Number: 5698754821
Claim Type: Claimant
Vehicle Condition: Driveable
Date of Loss: 10/10/99

Rental Branch Location:
6850 Ladue Rd.
St. Louis MO 63124-0001
314-512-0294

- 1 Please include this reference number on your check: 567347585
- 2 Remit to: Enterprise Rent-A-Car
- 3 Total Amount: \$536.13
- 4 Enter the check number for your payment here:
- 5 Send Payment to:
Enterprise Rent-A-Car
6850 Ladue Rd.
St. Louis, MO 63124-0001

Crystal, Billy **Invoice 2**

Invoice: PPGM 0073082
Federal ID: 48-0791835
Invoice Date: 10/22/99
Claim
Claim Number: 56987987655
Claim Type: Claimant
Vehicle Condition: Driveable
Date of Loss: 10/10/99

Rental Branch Location:
234 Bonhomme St.
Clayton, MO 63100-2011
314-539-9899

- 1 Please include this reference number on your check: 56789876
- 2 Remit to: Enterprise Rent-A-Car
- 3 Total Amount: \$536.13
- 4 Enter the check number for your payment here:
- 5 Send Payment to:
Enterprise Rent-A-Car
6850 Ladue Rd.
St. Louis, MO 63124-0001

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2.1.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.1.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.1.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

2.1.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

2.1.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

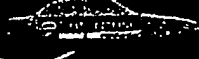
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2.2 Bulk Payment List

This screen will allow the user to pick which functions that he/she may want to change.

2.2.1 Screen Layout – Bulk Payment List



Welcome to the Automated Rental Management System

create a **RESERVATION** find a **CUSTOMER**

Claims Office: **001** Handling for: **Yourself**

Invoicing:
BULK PAYMENT LIST

GEICO

<p>Webster, Andrew</p>	<p>Invoice 1 Invoice: PPGM D073082 Federal ID: 48-0791835 Invoice Date: 10/22/99 Claim Claim Number: 5598754821 Claim Type: Claimant Vehicle Condition: Driveable Date Of Loss: 10/10/99 Adjuster: Fitzgerald, Neil Claims Office: 001</p>	<p>Rental Branch Location 6850 Ladue Rd St. Louis, Mo 63124-0001 314-612-0294</p> <p>Total Due: \$512.36</p>
<p>Crystal, Billy</p>	<p>Invoice 2 Invoice: PPGM D073082 Federal ID: 48-0791835 Invoice Date: 10/22/99 Claim Claim Number: 5598754821 Claim Type: Claimant Vehicle Condition: Driveable Date Of Loss: 10/10/99 Adjuster: Fitzgerald, Neil Claims Office: 001</p>	<p>Rental Branch Location 234 Bonhomme St. Clayton, Mo 63100-2001 314-533-9699</p> <p>Total Due: \$512.36</p>

● Please include this reference # on your check:
567347585

● Remit to: Enterprise Rent-a-Car

● 2 invoices
Total Amount: \$536.13

● Enter the check number for your payment here:

● Send Payment to:
Enterprise Rent-a-Car
6850 Ladue Rd
St. Louis, Mo 63124-0001

● [top of page](#)

Cancel Us |
 Terms & Conditions |
 Log Off

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Invoicing – Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	152	Total amount due from Ins. Company	Total Amount Due	Total Charges - Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Locaiton's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.2.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.2.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

2.2.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

2.2.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

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2.3 Return Invoice to Adjuster

2.3.1 Screen Layout – returnBilling.shtml

Return Billing

Return Billing

You've chosen to return the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Warner, Kurt	Bamvakais, John	569873451	\$271.14

Reason for return: Rental start date before date of loss

Comments:

2.3.2 Return Billing

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Total Amount Due from Ins. Company	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Adjuster's last name + adjuster's first name.
Comments	Input	50	Reason Comments	NOTE	
Renter Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason For Return	ComboBox	50	Reason For Return	standard message description	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen from which they came. The invoice will still be displayed with the status of the invoice unchanged.

2.3.3.2 Return to Adjuster

When clicked, the user will return the invoice to the Adjuster for further instructions and the status will show returned invoice.

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3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Approved Invoices (Office Id)

The get approved invoices operation finds all the approved invoices for the specified office.

3.2 Get Invoice Detail (Invoice Number)

The get invoice detail operation gets the relevant invoice information for the specified invoice number.

3.3 Return Invoice to Approving Adjuster (Invoice Number, Reason Code)

The return invoice to approving adjuster operation marks the specified invoice so that the approving adjuster can review the invoice and re-approve it.

3.4 Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

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4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 action item complete date

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	ATMCMPDIT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.3 action item effective date

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

4.1.4 action item status code

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

4.1.5 action item type code

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors

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	and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of
--	--

4.1.6 action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)
Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an

4.1.7 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.8 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.9 ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.

4.1.10 assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

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4.1.11 assigned to company identifier

Entity	ACTION ITEM
Column Name	assgn_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

4.1.12 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.13 Branch

Entity	A4 Cross Reference
Column Name	br_id
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.14 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number:
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

4.1.15 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.16 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code

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	which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.
--	--

4.1.17 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier.
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.18 company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lvl_cde
Label Name	company structure level code.
System Name	CMPYSLVLC
Data Type	DEC(3,0)
Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.

4.1.19 Customer Transaction ID

Entity	ACTION ITEM
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.20 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.21 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

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4.1.22 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.23 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.24 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies

4.1.25 Federal ID Number

Entity	A4 Invoice Header
Column Name	IIFETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.26 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

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4.1.27 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.28 Group

Entity	A4 Cross Reference
Column Name	grp_id
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.29 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.30 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.31 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor code is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.32 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:

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System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.33 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.34 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.35 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.36 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT\$\$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.37 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS
Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

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4.1.38 Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity
System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.39 Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.40 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.41 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.43 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	

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Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.44 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.45 Record Add Date

Entity	A4 Invoice Header
Column Name	IIADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.46 related office identifier

Entity	ACTION ITEM
Column Name	rel_ofc_id
Label Name	related office identifier:
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the action item.

4.1.47 Request Type

Entity	A4 Cross Reference
Column Name	X4RSFG
Label Name	Request Type
System Name	
Data Type	CHAR(1)
Attribute Definition	

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

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4.1.49 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.51 Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)
Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.

4.1.52 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.53 Ticket Number

Entity	A4 Cross Reference
Column Name	X4TKNO
Label Name	Ticket Number
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.54 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

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4.1.55 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.56 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	I3OT\$\$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.57 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

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5. Questions and Answers

None.

Enterprise Rent-A-Car

Functional Design Specification Reject an Invoice

Version 1.0

Last Saved: 6/29/00 9:35 AM

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Reject an Invoice

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Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 16, 2000	0.4	Made changes per cross team QA	Deb Ealick, Cindy Bastean
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various parts of document	Brad Reel
September 14, 2000	1.0	Updated various parts of document	Brian Weingart

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1. Reject An Invoice Use Case

1.1 Brief Description

The Reject an Invoice use case describes how the ADJUSTER would reject an invoice to Enterprise in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to reject an invoice.

1.3 Pre-Conditions

- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be set up to approve invoices.

1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to reject invoices.

ARMS Redesign Project - Release 1.0

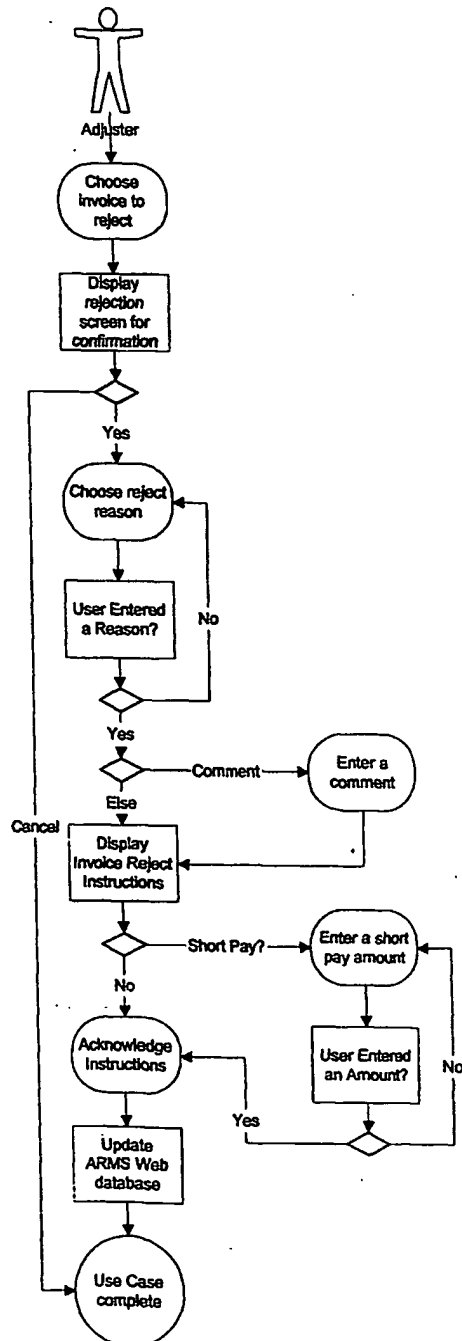
Issue: 1.0

Reject an Invoice

Issue Date: 10/20/00

1.4.1 Activity Diagram

Reject an Invoice Activity Diagram



\\FSCORP001\CORP_PUBLIC\APPS\#ARMSWEB\APPLICATION\@DKB\ARMS WEB\RELEASE
ONE\BI-BILLING AND INVOICING\BI-03-REJECT AN INVOICE\ACTBI-03-ACTIVITY
DIAGRAM.VSD

6/20/00

ARMS Redesign Project - Release 1.0

Issue: 1.0

Reject an Invoice

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1.4.2 Basic Flow

1. The ADJUSTER will reject an invoice.
2. The system will prompt for reject confirmation.
3. The ADJUSTER will enter a reject reason for rejecting the invoice.
4. The ADJUSTER may enter comments to be added to the diary notes.
5. The ADJUSTER will submit the rejection to the system.
6. The system will display instructions for achieving resolution on the rejected invoice.
7. The ADJUSTER will acknowledge that they understand the instructions.
8. The system will update the ARMS Web database to reflect that the ADJUSTER rejected the invoice.
9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Cancel Rejection

At steps two through seven of the Basic Flow, the ADJUSTER must have the ability to cancel the invoice rejection process. Canceling the rejection should return the ADJUSTER to the Invoicing Approval Screen or the Invoicing Individual Payment screen. The invoice that was to be rejected should be displayed. The status of the invoice should be unapproved.

1.4.3.2 No Reject Reason Given

At step three in the Basic Flow; if the ADJUSTER attempts to bypass entering a reject reason, they will be prompted to enter one. The ADJUSTER will not be allowed to complete the rejection process without providing a reject reason.

1.4.3.3 Short Pay

If the reject reason given in step three of the Basic Flow is a reason that requires a short pay, at step five of the Basic Flow the system will display a field for entry of the short pay amount. The ADJUSTER will not be allowed to complete the rejection process without providing an amount that will be paid.

1.5 Post-Conditions

- If the use case was successful the invoice will be marked rejected in the ARMS Web system.
- If the use case was unsuccessful, the status remains unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Invoices are Initially Auto Approved

If an ADJUSTER'S invoices are normally auto approved, functionality needs to exist to route invoices to them when they are returned to ADJUSTER from the PROCESSOR. This functionality will need to override the normal routing processes that exist at the office.

1.7 Extension Points

None.

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Issue: 1.0

Reject an Invoice

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Reject Billing Reason

This screen will allow the user to begin the rejection process.

2.1.1 Screen Layout – Reject Billing Reason

http://grace/armsweb/tp/iteration_1/rejectBillingPage1.html

Reject Billing

You've chosen to reject the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Walter, Port	Banwalkers, John	5616754821	\$271.18

Reason for rejection:

Comments:

Enterprise goes to extreme lengths to ensure that your invoice is calculated correctly, are you sure that you would like to reject?

2.1.2 Reject Billing – Reject Billing Reason

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Amount	Output	10	Total Amount Due	CALCULATED	
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Comments	Input	50	Message Text	NOTE	
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason for Rejection	List Box	20	Rejection Reasons	standard message description	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

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Issue: 1.0

Reject an Invoice

Issue Date: 10/20/00

2.1.3.1 CONTINUE

The system will validate the input from the screen according to the listed business rules. If the validation passes, the rejection process will continue.

The following business rules that must be passed before the USER may continue to the next step in the rejection process are the following:

- A valid rejection reason must be selected from the drop down box
- If the rejection reason selected is "Other" a comment must be entered

2.1.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

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Issue: 1.0

Reject an Invoice

Issue Date: 10/20/00

2.2 Reject Billing Amount**2.2.1 Screen Layout – Reject Billing Amount**

Reject Billing

You've chosen to reject the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Warner, Kurt	Bamvakais, John	5698754821	\$271.18

Amount you are paying:

To complete this process, please contact the rental branch location listed below:

Enterprise Rent-A-Car
600 New Haven Rd.
Charlotte, NC 28210
704-553-2001

2.2.2 Reject Billing – Reject Billing Amount

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Invoice Amount	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	User's Name	First Name + Last Name	Adjuster's last name + adjuster's first name. The name of the current adjuster in the system
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	30	Rental Location City, State and Zip	City + State + Zip Code	
	Output	15	Rental Location Telephone Number	Telephone Number	

ARMS Redesign Project - Release 1.0

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Reject an Invoice

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
To complete this process, please contact the Enterprise Branch listed below:	Output	50	Rental Location Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 REJECT INVOICE

The system will validate the input from the screen. If the validation passes, the invoice will be marked as rejected and the Arms Web database will be updated. If an amount was entered in the "Amount you are paying" field, then the invoice should be marked short paid.

2.2.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

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Issue: 1.0

Reject an Invoice

Issue Date: 10/20/00

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Invoice Rejection Reasons (Company Id)

The get invoice rejection reasons gets the predefined rejection reasons for the company.

3.2 Reject Invoice (Invoice Number)

The reject invoice operation marks the specified invoice as rejected. The rejected invoice becomes an action item for the adjuster to handle.

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4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.5 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

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4.1.6 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.7 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.8 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific

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Issue: 1.0

Reject an Invoice

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	activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"
--	---

4.1.12 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.13 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.15 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification Callbacks

Version 1.1

Last Saved: 8/17/00 3:12 PM

ARMS Redesign Project - Release 2.0
Callbacks

Issue: 1.1
Issue Date: 8/18/2000

Revision History

Date	Issue	Description	Author
2000-07-06	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-25	0.2	Incorporated the screen designs that developed by the Marketing group.	Sean O'Donnell
2000-08-18	1.1	Made revisions to the screens based on feedback from Marketing and the Build teams.	Sean O'Donnell

Callbacks

1. Callbacks

1.1 Brief Description

This use case describes the process that will perform repair facility callbacks in the ARMS Web system. USERS perform repair facility callbacks on each of the rental contracts that are set to expire in the near future (or have already expired), to proactively determine if rentals must be extended due to slippage in repair facility time estimates. The callback process in the ARMS Web system will retrieve each of the rental contracts that will expire in the user-defined period of time, and organize them by repair facility to allow the USER to make one phone call to inquire about the potentially multiple vehicles that the repair facility is responsible for.

1.2 Use Case Actors

All actors will use the use case to retrieve callback lists in the ARMS Web system. All of the following actors can be defined generically as a USER:

- PROCESSOR
- ADJUSTER
- COMPANY MANAGER

For the balance of this use case, all of the above actors will be referred to as USER.

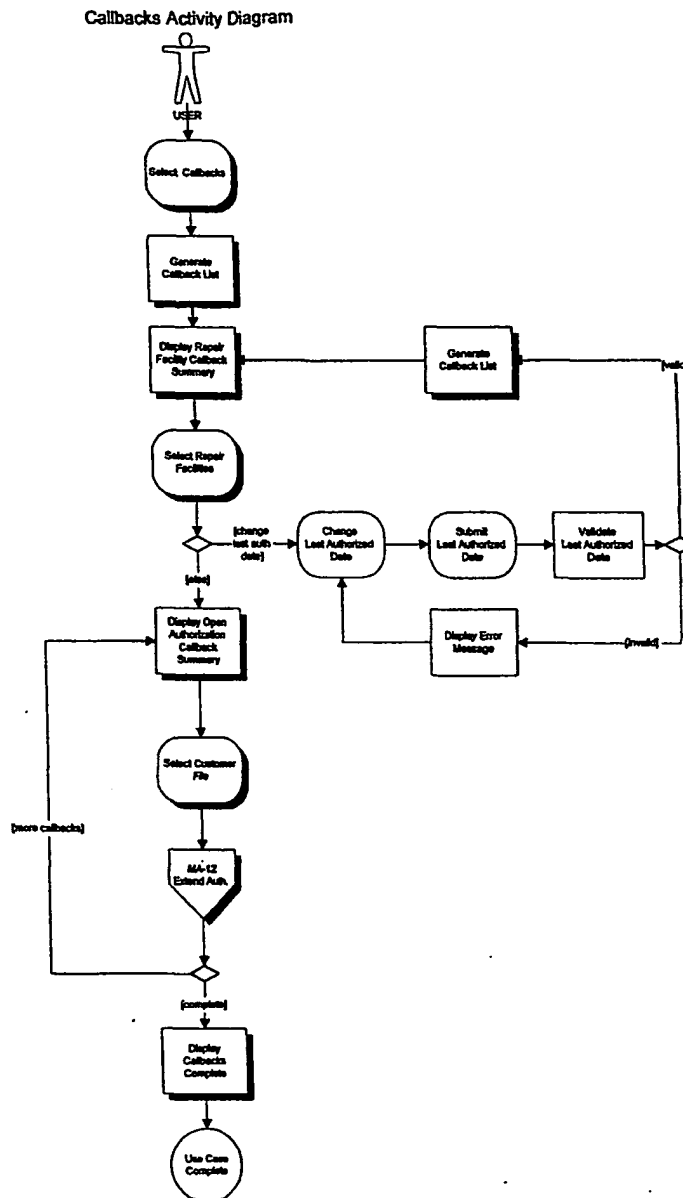
1.3 Pre-Conditions

- The USER must be signed-on to the system.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to retrieve and manage callbacks in the ARMS Web system.

1.4.1 Activity Diagram



1.4.2 Basic Flow

The **Basic Flow** of the Callbacks use case includes all of the required activities for the USER to successfully generate and perform repair facility callbacks in the ARMS Web system.

1. The USER selects to perform callbacks from the reporting menu of top navigation.
2. The system generates a report of all open authorizations for the selected office that will expire the next day (have a last authorized day of tomorrow). This list will include any authorizations that have already expired, or will expire by the end of business on the following day.

3. The system displays a summary of repair facilities that have rentals expiring in the specified timeframe. The repair facility callback summary must consist of:
 - Repair Facility Name
 - Repair Facility Telephone Number
 - Number of Rental callbacks due to the Repair Facility
4. The USER selects one or more repair facilities from the repair facility callback summary.
5. The system displays a summary of the open authorizations that are set to expire for all selected repair facilities. The open authorization callback summary will consist of:
 - Renter Name
 - Year/Make/Model of the Renter's Vehicle
 - Driveable Flag (y/n)
 - Number of Days Behind
 - Authorized Days
 - Last Authorized Day
6. The USER will select a customer file from the list.
7. The USER will extend into use case MA-12 Extend Authorization. The USER will have the ability to extend, add notes, terminate or modify an authorization as proscribed in the MA-12 Extend Authorization use case. If callbacks still exist, the USER will be returned to Step 5 of the Basic Flow on completion of the MA-12 Extend Authorization use case.

If all callbacks have been completed, the Basic Flow continues.
8. The system will display a screen to indicate that all repair facility callbacks for the office have been completed.
9. This ends this use case.

1.4.3 Alternative Flows

The Alternative Flows of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Change Last Authorized Date

At Step 3 or Step 5 of the Basic Flow, the USER has the ability to change the last authorized day to any day in the future. The system will re-generate the callbacks list and the USER will be returned to Step 2 of the Basic Flow on submission of the new last authorized day.

1.4.3.2 Last Authorized Date Entered Invalid

In the Change Last Authorized Date Alternative Flow, if the last authorized date entered by the USER is invalid, the system will return to the beginning of the Change Last Authorized Date Alternative Flow and provide the USER with an error message.

1.4.3.2.1 It will be considered invalid if the last authorized date entered is less than the current date.

1.5 Post-Conditions

- If successful, a callback list is created for the USER.

- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

None.

1.7 Extension Points**1.7.1 MA-12 Extend Authorization**

At Step 7 of the Basic Flow, the USER will extend from the use case to the MA-12 Extend Authorization use case. This will allow the USER to update the open authorization with the results of the repair facility callback (e.g., extend, add notes, or terminate the rental authorization). On completion of the MA-12 Extend Authorization use case, the rules specified within the Basic Flow should be followed as to the next step in the process.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Repair Facility Callback Summary

This screen provides the USER with a repair facility callback summary, and supports Step 3 of the Basic Flow.

2.1.1 Screen Layout



Enterprise Rent-A-Car

Functional Design Specification Reject an Invoice

Version 1.0

Last Saved: 6/29/00 9:35 AM

ARMS Redesign Project - Release 1.0
Reject an Invoice

Issue: 1.0
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
April 19, 2000	0.1	Initial Creation of Section 1.0	Brad Reel
April 24, 2000	0.2	Changes to reflect initial team review	Brad Reel
May 9, 2000	0.3	Included all subdocuments	Cindy Bastean
May 9, 2000	0.3	Added changes from Final Team Review, Removed subdocuments	Brad Reel, Deb Ealick, Anil Kabra, Cindy Bastean
May 16, 2000	0.4	Made changes per cross team QA	Deb Ealick, Cindy Bastean
June 8, 2000	0.5	Added Data Field Information	Cindy Bastean
June 30, 2000	1.0	Updated various parts of document	Brad Reel
September 14, 2000	1.0	Updated various parts of document	Brian Weingart

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4.1.9	Last Name	10
4.1.10	Last Name	10
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4.1.12	State	11
4.1.13	Telephone Number	11
4.1.14	Total Amount Due	11
4.1.15	Zip Code	11

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Reject an Invoice

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1. Reject An Invoice Use Case

1.1 Brief Description

The Reject an Invoice use case describes how the ADJUSTER would reject an invoice to Enterprise in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to reject an invoice.

1.3 Pre-Conditions

- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be set up to approve invoices.

1.4 Flow of Events

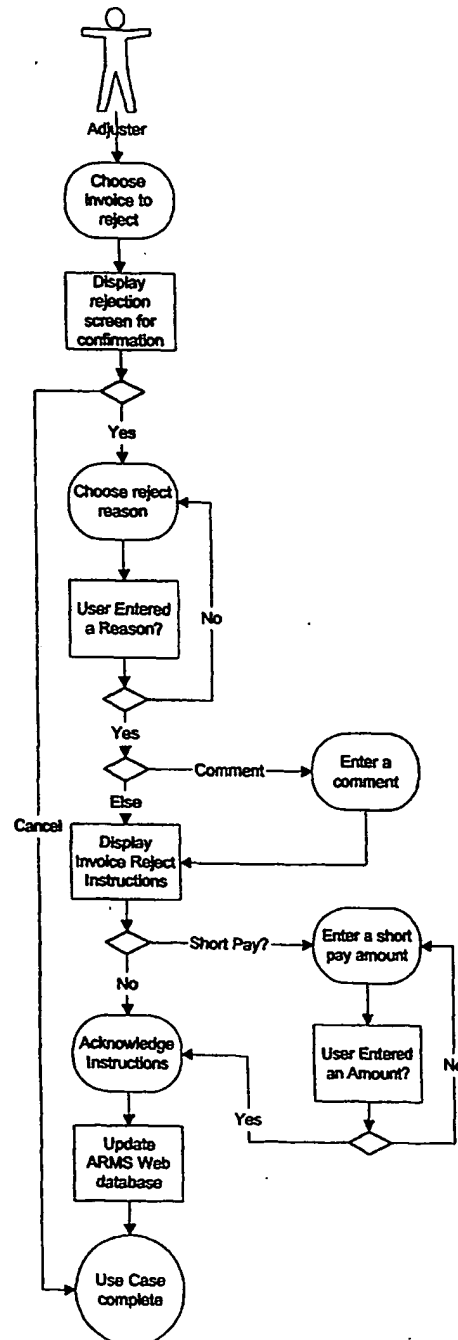
The Flow of Events will include the necessary steps for an ADJUSTER to reject invoices.

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Reject an Invoice

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1.4.1 Activity Diagram

Reject an Invoice Activity Diagram



\\FSCORP001\CORP_PUBLIC\APPS\#ARMSWEB\APPLICATION\@DKB\ARMS WEB\RELEASE
ONE\BI-BILLING AND INVOICING\BI-03-REJECT AN INVOICE\ACTBI-03-ACTIVITY
DIAGRAM.VSD

6/20/00

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1.4.2 Basic Flow

1. The ADJUSTER will reject an invoice.
2. The system will prompt for reject confirmation.
3. The ADJUSTER will enter a reject reason for rejecting the invoice.
4. The ADJUSTER may enter comments to be added to the diary notes.
5. The ADJUSTER will submit the rejection to the system.
6. The system will display instructions for achieving resolution on the rejected invoice.
7. The ADJUSTER will acknowledge that they understand the instructions.
8. The system will update the ARMS Web database to reflect that the ADJUSTER rejected the invoice.
9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Cancel Rejection

At steps two through seven of the Basic Flow, the ADJUSTER must have the ability to cancel the invoice rejection process. Canceling the rejection should return the ADJUSTER to the Invoicing Approval Screen or the Invoicing Individual Payment screen. The invoice that was to be rejected should be displayed. The status of the invoice should be unapproved.

1.4.3.2 No Reject Reason Given

At step three in the Basic Flow; if the ADJUSTER attempts to bypass entering a reject reason, they will be prompted to enter one. The ADJUSTER will not be allowed to complete the rejection process without providing a reject reason.

1.4.3.3 Short Pay

If the reject reason given in step three of the Basic Flow is a reason that requires a short pay, at step five of the Basic Flow the system will display a field for entry of the short pay amount. The ADJUSTER will not be allowed to complete the rejection process without providing an amount that will be paid.

1.5 Post-Conditions

- If the use case was successful the invoice will be marked rejected in the ARMS Web system.
- If the use case was unsuccessful, the status remains unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Invoices are Initially Auto Approved

If an ADJUSTER'S invoices are normally auto approved, functionality needs to exist to route invoices to them when they are returned to ADJUSTER from the PROCESSOR. This functionality will need to override the normal routing processes that exist at the office.

1.7 Extension Points

None.

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Reject an Invoice

Issue: 1.0
Issue Date: 10/20/00

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Reject Billing Reason

This screen will allow the user to begin the rejection process.

2.1.1 Screen Layout – Reject Billing Reason

Reject Billing

You've chosen to reject the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Walter, J.	Samuel, John	555175411	\$27,113

Reason for rejection:

Comments:

Enterprise goes to extreme lengths to ensure that your invoice is calculated correctly. Are you sure that you would like to reject?

2.1.2 Reject Billing – Reject Billing Reason

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Amount	Output	10	Total Amount Due	CALCULATED	
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Comments	Input	50	Message Text	NOTE	
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason for Rejection	List Box	20	Rejection Reasons	standard message description	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

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2.1.3.1 CONTINUE

The system will validate the input from the screen according to the listed business rules. If the validation passes, the rejection process will continue.

The following business rules that must be passed before the USER may continue to the next step in the rejection process are the following:

- A valid rejection reason must be selected from the drop down box
- If the rejection reason selected is "Other" a comment must be entered

2.1.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

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Reject an Invoice

Issue: 1.0
Issue Date: 10/20/00

2.2 Reject Billing Amount

2.2.1 Screen Layout – Reject Billing Amount

Reject Billing

You've chosen to reject the following invoice.

Adjuster's Name	Renter's Name	Claim Number	Amount
Warner, Kurt	Barnwakais, John	5696754821	\$271.18

Amount you are paying:

To complete this process, please contact the rental branch location listed below:

Enterprise Rent-A-Car
600 New Haven Rd.
Charlotte, NC 28210
704-553-2001

2.2.2 Reject Billing – Reject Billing Amount

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Invoice Amount	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	User's Name	First Name + Last Name	Adjuster's last name + adjuster's first name. The name of the current adjuster in the system
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	30	Rental Location City, State and Zip	City + State + Zip Code	
	Output	15	Rental Location Telephone Number	Telephone Number	

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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
To complete this process, please contact the Enterprise Branch listed below:	Output	50	Rental Location Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 REJECT INVOICE

The system will validate the input from the screen. If the validation passes, the invoice will be marked as rejected and the Arms Web database will be updated. If an amount was entered in the "Amount you are paying" field, then the invoice should be marked short paid.

2.2.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

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Reject an Invoice

Issue: 1.0
Issue Date: 10/20/00

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Invoice Rejection Reasons (Company Id)

The get invoice rejection reasons gets the predefined rejection reasons for the company.

3.2 Reject Invoice (Invoice Number)

The reject invoice operation marks the specified invoice as rejected. The rejected invoice becomes an action item for the adjuster to handle.

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Reject an Invoice

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Issue Date: 10/20/00

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification

4.1.1 accounting name

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.5 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbrev_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

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4.1.6 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.7 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.8 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	IICLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific

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	activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"
--	---

4.1.12 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.13 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.15 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Enterprise Rent-A-Car

Functional Design Specification Generate Personal Report

Version 1.11

Last Saved: 8/16/00 3:01 PM

ARMS Redesign Project - Release 2.0
Generate Personal Report

Issue: 1.11
Issue Date: 8/16/2000

Revision History

Date	Issue	Description	Author
	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-03	0.2	Revisions to the Reporting Specification made based on feedback from the business, user groups, and additional functional requirement definition	Sean O'Donnell
2000-07-21	0.3	Added screen design section to the document based on the screen concepts designed by Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to design team for construction.	Sean O'Donnell
2000-08-09	1.1	Version updated to include revisions and comments made by the business and build teams. Added the ability to filter report views by claim type. Removed all reference to multi-company users.	Sean O'Donnell

ARMS Redesign Project - Release 2.0
Generate Personal Report

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Generate Personal Report

1. Generate Personal Report

1.1 Brief Description

This use case describes how a USER would generate a report on their personal rental management activity. Personal reports allow the USER access to reporting on only their own rental management activity, which allows the USER to review their own performance and secures access to the rental management reports of others.

1.2 Use Case Actors

All actors will use the use case to generate personal reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

- ADJUSTER
- PROCESSOR
- COMPANY MANAGER

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

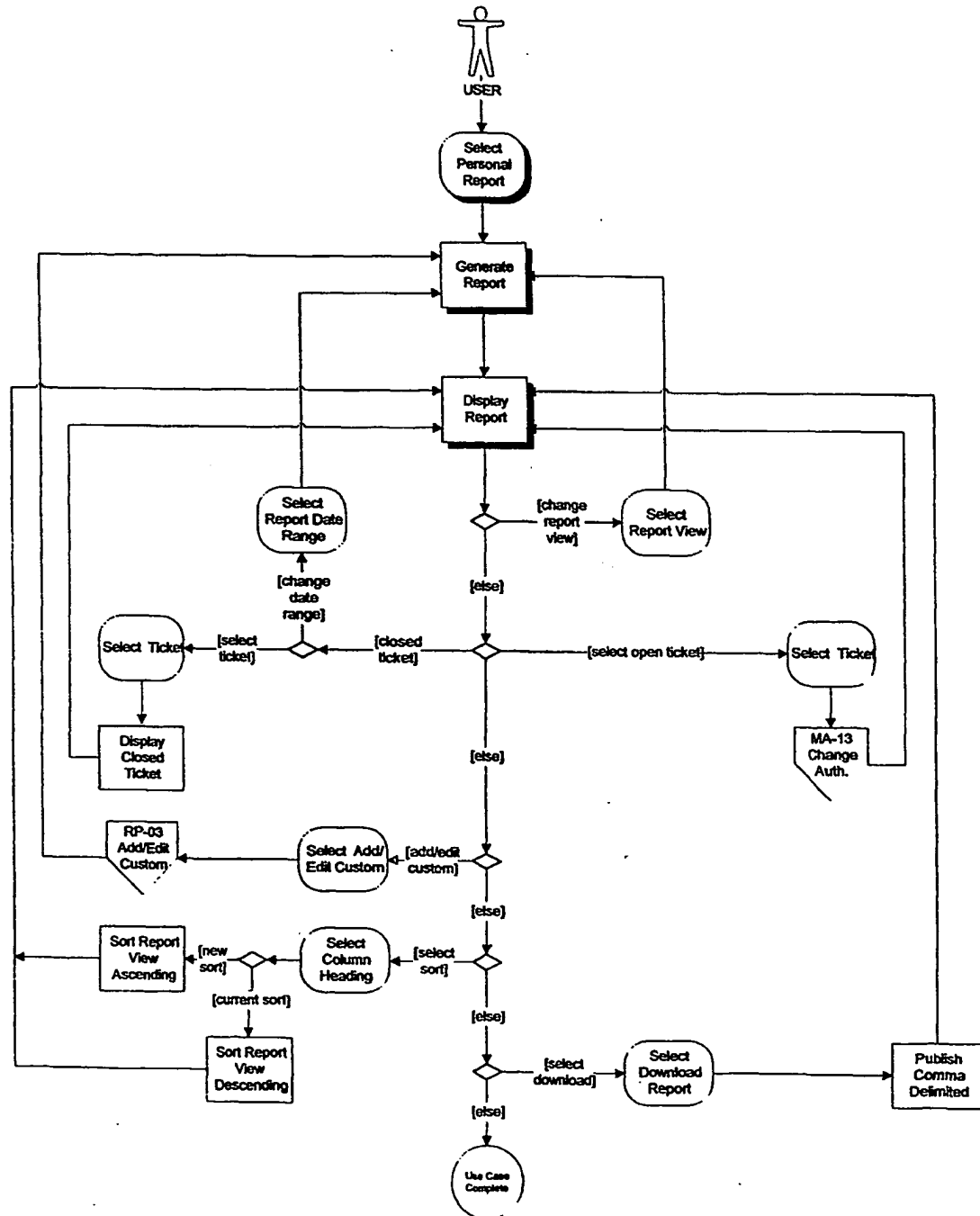
- The USER must be signed-on to the system.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to generate personal reports in the ARMS Web system.

1.4.1 Activity Diagram

Generate Personal Report Activity Diagram



1.4.2 Basic Flow

The **Basic Flow** of the Generate Personal Report use case includes all of the required activities for the USER to successfully generate and view a standard personal report in ARMS Web.

1. The USER selects to generate a personal report from the top navigation bar.
2. The system generates the report for the specific USER. The report should provide rental management reports for the signed-in USER. The default report view to display to the USER will be the Open Ticket Detail view (see section 1.6.1 of the Special Requirements section on page 5 for further definition).
3. The system displays the report to the USER.
4. This ends this use case.

1.4.3 Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided. The **Alternative Flows** are optional and only occur if the conditions specified are met.

1.4.3.1 Change Report View

At Step 3 of the **Basic Flow**, the USER will have the ability to change the report 'view'. Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope. For example, the USER can select to change to a closed ticket detail view from the open ticket detail view, but the information presented is limited (scoped) to the rental management activity of the USER.

If the USER selects to change the report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the requested view.

1.4.3.2 Change Closed Ticket Date Range

At Step 3 of the **Basic Flow**, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will not have the ability to select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the USERs closed ticket report for the selected date range.

1.4.3.3 Select Open Ticket from Open Ticket Detail Report

At Step 3 of the **Basic Flow**, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 3 of the **Basic Flow**).

¹ Report views are covered in more detail in Section 1.6 Special Requirements.

1.4.3.4 Select Closed Ticket from Closed Ticket Detail Report

At Step 3 of the Basic Flow, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file. When selected, the system will present the USER with the closed customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be returned to the closed ticket detail report (Step 3 of the Basic Flow).

1.4.3.5 Sort Report

At Step 3 of the Basic Flow, the USER will have the ability to select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle between ascending and descending sort order by re-selecting the currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted ascending by renter last name. If the USER would like to reverse the sort order to descending, selecting the column heading again would allow the report to be resorted descending by renter last name.

The system will return the USER to Step 3 of the Basic Flow on completion of this Alternative Flow, with the report view resorted according to the USER request.

1.4.3.6 Add/Edit Custom View

At Step 3 of the Basic Flow, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

On completion of the use case extension, the USER will be returned to Step 2 of Basic Flow in this use case and be presented with the custom report layout that was defined/modified.

1.4.3.7 Select Download Report

At Step 3 of the Basic Flow, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- Report View (open ticket detail/closed ticket detail)
- Name of the Adjuster
- Date and time the report was generated

The system should return the USER to the report view (Step 3 of the Basic Flow) once a report has been successfully downloaded.

1.5 Post-Conditions

- If successful, a standard report is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

The special requirements for this use case define all of the personal report 'views' that are available to the USER. This list of personal report views may be expanded at a later date to include additional information from the ARMS/400 reporting detail files, but only these views are anticipated for the initial release.

1.6.1 Open Ticket Detail View

The Open Ticket Detail View provides the USER with columns of data on all currently open tickets under their management. The Open Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Rental Days*
7. Number of Days Behind*
8. Number of Extensions*
9. Surcharges (Y/N)
10. Authorized Amount*

Specific rules that must apply to the Open Ticket Detail report view are outlined in the sections below;

- 1.6.1.1 *Data Columns in the Open Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Open Ticket Detail report.*
- 1.6.1.2 *All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.*
- 1.6.1.3 *The default sort for the Open Ticket Detail view must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.*
- 1.6.1.4 *Any open tickets that have a value greater than zero (0) in the Number of Days Behind field should be highlighted to the USER.*
- 1.6.1.5 *The report must include a count of the total number of contracts in the list.*
- 1.6.1.6 *The report view must include report header information (in both screen and downloaded versions) that includes:*
 - the type/view of report (open ticket detail)
 - the name of the USER for whom the report was generated
 - the date/time the open ticket report was generated

1.6.2 Closed Ticket Detail View

The Closed Ticket Detail View provides the USER with columns of data on closed ticket activity for the currently selected date range (the default date range is the current plus previous two (2) months). The Closed Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Billed Days*
7. Number of Extensions*
8. Total Charges*
9. Amount Received*
10. Billed Amount*

Specific rules that must apply to the Closed Ticket Detail report view are outlined in the sections below;

1.6.2.1 *Data Columns in the Closed Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Closed Ticket Detail report.*

1.6.2.2 *All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.*

1.6.2.3 *The default sort for the Closed Ticket Detail view must be by the Claim Number field.*

1.6.2.4 *The report must include a count of the total number of contracts in the list.*

1.6.2.5 *The report view must include report header information (in both screen and downloaded versions) that includes:*

- the type/view of report view (closed ticket detail)
- the name of the USER for whom the report was generated
- the date/time the open ticket report was generated

1.6.3 Custom Report Views

The USER will have the ability to define their own custom report views through the RP-03 Add/Edit Custom View use case. These custom views are accessible from the Personal Reporting module of ARMS Web.

1.6.4 Report View Management

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will not be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

1.7 Extension Points

This section describes the extension points of this use case.

1.7.1 MA-13 Change Authorization

If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report Alternative Flow on page 3 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 3 of the Basic Flow within this use case (be presented with the Open Ticket Detail report).

1.7.2 RP-03 Add/Edit Custom View

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View Alternative Flow on page 4 for additional detail). The USER will define or modify their custom report layout and be returned to Step 2 of the Basic Flow within this use case.

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Generate Personal Report

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Personal Report Template Screen

This screen provides the template to build personal report 'views', and supports Step 3 of the Basic Flow.

2.1.1 Screen Layout

WELCOME to the
Automated Rental Management System

CREATE a RESERVATION find a CUSTOMER

Office: 001 Handling for: Yourself

Personal Reports: for <Report By> as of <Time/Date Stamp>
<Report Type>
[Choose a different report](#)

(Click on the column heading to sort) [Go to Report Averages](#)

<Column 1>	<Column 2>	<Column 3>	<Column 4>	<Column 5>	<Column 6>	<Column 7>	<Column 8>	<Column 9>	<Column 10>
1 Walker, L	12345678901234567890	Insured	15	13	1	2	20.00	YES	\$260.00
Griffey Jr., K	12345678901234567890	Claimant	10	13	0	0	18.00	NO	\$220.67
Lankford, R	12345678901234567890	Claimant	7	15	0	0	21.00	YES	\$350.85
Totals: 6 Customer Files			Averages	7.16	13.33	.33	0.5	21.32	\$261.68

[top of page](#) [Download this report](#)

View a different report:
Select a view: [Open Ticket Summary](#)
Show Only: [All Claim Types](#)
For Closed Tickets, please select a time period:
From: [January 2000](#)
To: [March 2000](#)
[top of page](#)

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	This combo list should include all of the offices for the currently active company that the USER is assigned to. If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office.
Handling for	Output Text		Handling for	For personal reports, this value should always be 'Yourself'.
	Output Text		<Report By>	The <report by> field is a place holder in the header of the report view. For personal reports, this placeholder should be populated with the name of the user that is being reported on (i.e., the name of the user that requested the report).

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Screen Label	Type	Length	Data Field	Screen Specific Rule
	Output Text		<Time/Date Stamp>	The <time/date stamp> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the date and time that the report was generated.
	Output Text		<Report Type>	The <report type> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)
<Column Heading 1 through X>	Output Text		<Data Columns 1 through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/customer files that are represented in the report.
Select a view	Combo Box		Report view selection	<p>The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views.</p> <p>There should be an additional option to 'Add a custom view...'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification.</p>
Show Only	Combo Box		Claim Type Filter	<p>The 'show only' combo box should include the following values:</p> <ul style="list-style-type: none"> • All Claim Types (default) • Insured Claim Types • Claimant Claim Types • Uninsured Claim Types • Theft Claim Types <p>When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured'.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
From	Combo box		Closed ticket report from date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'.</p> <p>The default value should be 13 months prior to the current month.</p>
To	Combo box		Closed ticket report to date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'.</p> <p>The default value should be the current month.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column heading, the system will resort the report view by the column selected in ascending order. If the sorted column is selected by the USER, the system will resort the report in descending order.

2.1.3.4 Download this report

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

- ❖ Report Header Information
 - Name of the Report View
 - Name of the Person
 - Date and Time that the Report Was generated
- ❖ Report View Column Headings

❖ Report View Records

2.1.3.5 View Report

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.6 Edit Custom View

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.



Claims Office: 003

Handling for: Yourself

Authorize Direct Bill: for Reed, Keith Claim no. 123-9829
CUSTOMER FILE

Direct Bill Requested for: Claim Number: 123-9829

Claim Type: Insured

days @ Economy/18.99

Policy: Daily rate/ Maximum dollars Please chose a rate.

Direct Bill%: 100

Vehicle Condition: Please select a condition

Date of Loss: September 20 2000

Date Rental Needed: September 22 2000

Insured Name: Last First

Note to Enterprise:

Note to Self Only:

Messages:

Go to [Notebook](#)

[\[Change or Add\]](#)

RENTER INFORMATION:

Keith Reed

Home: (314)555-3876

Work: Work: N/A

Email: N/A

RENTAL INFORMATION:

Enterprise Rent-A-Car Location:

ENTERPRISE RENT-A-CAR
3725 BOGEY RD
SAINT CHARLES MO 633033105
6369463010

ADDITIONAL CLAIM INFORMATION:

Insured Name: N/A
Owner's vehicle: N/A
Date of Loss: 9/20/00

Repair Facility:
N/A

WO 02/097700

PCT/US01/51431

921

Enterprise Rent-A-Car

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Date of Loss: 9/20/00

Type of Loss:

NOTEBOOK:

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Claims Office: 003

Handling for: Yourself

Extend Rental: for Scott Clinton Claim no. 615-3456
CUSTOMER FILE

1 of

Extension requested for:

additional authorized days @

Note to Enterprise:

Messages:

Go to [Notebook](#)

Note to Self:

Current Rental Status:

Rental Start Date: 9/22/00
Last authorized ending date: 9/26/00
Authorized to date: 4
Charges to Date: \$83.96*
Direct Bill %: 100

Rental Location:
ENTERPRISE RENT-A-CAR
(314)918-1300
Repair Facility:
Owner's vehicle:
Vehicle Condition : Driveable

*Does not include taxes and surcharges

☐ **Extend this rent**

[\[Change or Add\]](#)

RENTER INFORMATION:

Scott, Clinton

Home: (314)555-2345
Work: N/A
Email: N/A

RENTAL INFORMATION:

Current Class: Compact
Additional Charges: None
Direct Bill %: 100
Rental Date: 9/22/00
Start Date: 9/21/00

Enterprise Rent-A-Car Location:
ENTERPRISE RENT-A-CAR
2229 S BRENTWOOD BLVD
SAINT LOUIS MO 631441832
(314)918-1300

ADDITIONAL CLAIM INFORMATION:

Claim Number: 615-3456
Claim Type: Claimant
Insured Name:
Owner's vehicle:
Date of Loss: 9/21/00
Type of Loss: Driveable
Policy: Daily rate/
Maximum dollars:

Repair Facility:

NOTEBOOK:

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Claims Office: 003

Handling for: Yourself

Personal Reports: for <Report By> as of <Time/Date Stamp>

<Report Type>

[Choose a different report](#)

[Click on the column heading to sort] [Go to Report Totals](#)

<u>Renter Name</u>	<u>Claim Number</u>	<u>Claim Type</u>	<u>Billed Days</u>	<u>Authorized Days</u>	<u>Number of Extensions</u>	<u>Authorized Rate</u>	<u>Amount Received</u>
<u>Walker, L</u>	12345678901234567890	Insured	15	13	2	20.00	YES
<u>Oquendo, J</u>	12345678901234567891	Insured	13	12	1	25.00	YES
<u>Griffey Jr., K</u>	12345678901234567890	Claimant	10	13	0	16.99	NO
<u>McGwire, M</u>	12345678901234567892	Uninsured	5	12	0	19.99	NO
<u>Lankford, R</u>	12345678901234567891	Claimant	7	0	0	23.99	YES
<u>Jordan, B</u>	12345678901234567891	Claimant	8	15	0	21.99	NO
Totals 6 Customer Files		Averages	7.16	13.33	.33	0.5	

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*Excludes taxes and government

[Download](#)

Choose a different report:

Select a view:

For Closed Tickets, please select a time period:

From:

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Enterprise Rent-A-Car

Functional Design Specification Generate Management Report

Version 1.11

Last Saved: 8/16/00 3:19 PM

Revision History

Date	Issue	Description	Author
	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-06	0.2	Revisions to the Reporting Specification made based on feedback from the business, user groups, and additional functional requirement definition	Sean O'Donnell
2000-07-21	0.3	Added screen design section to the document based on the screen concepts designed by Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to the build team for construction.	Sean O'Donnell
2000-08-09	1.1	Updated the specification based on comments from the business and build teams. Added the ability to filter report views by claim type. Removed all reference to multi-company users.	Sean O'Donnell

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Generate Management Report

1. Generate Management Report

1.1 Brief Description

This use case describes how a USER would request and generate management reports using the on-line reporting functionality of ARMS Web. On-line management reports provide real-time access to open and closed ticket information, which provides the management team of our customers with a tool to effectively monitor rental management statistics. Using the on-line reporting functionality, USERS can request and receive summarized and detailed rental management reports on their Office, on Adjusters within an office, or on the Repair Facilities that are trading partners of a particular office.

NOTE: The on-line reporting functionality of ARMS Web provides ARMS ticket data only. ARMS and Non-ARMS reporting is available through the monthly L480 report.

1.2 Use Case Actors

All actors will use the use case to generate management reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER** – Adjusters may be granted the authority to access management reports in their user profile¹.
- **COMPANY MANAGER** – All users that are identified to the system as managers will have access rights to the management reporting functionality.

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- The USER must be signed-on to the system.
- The USER must have the authority to access management reports.

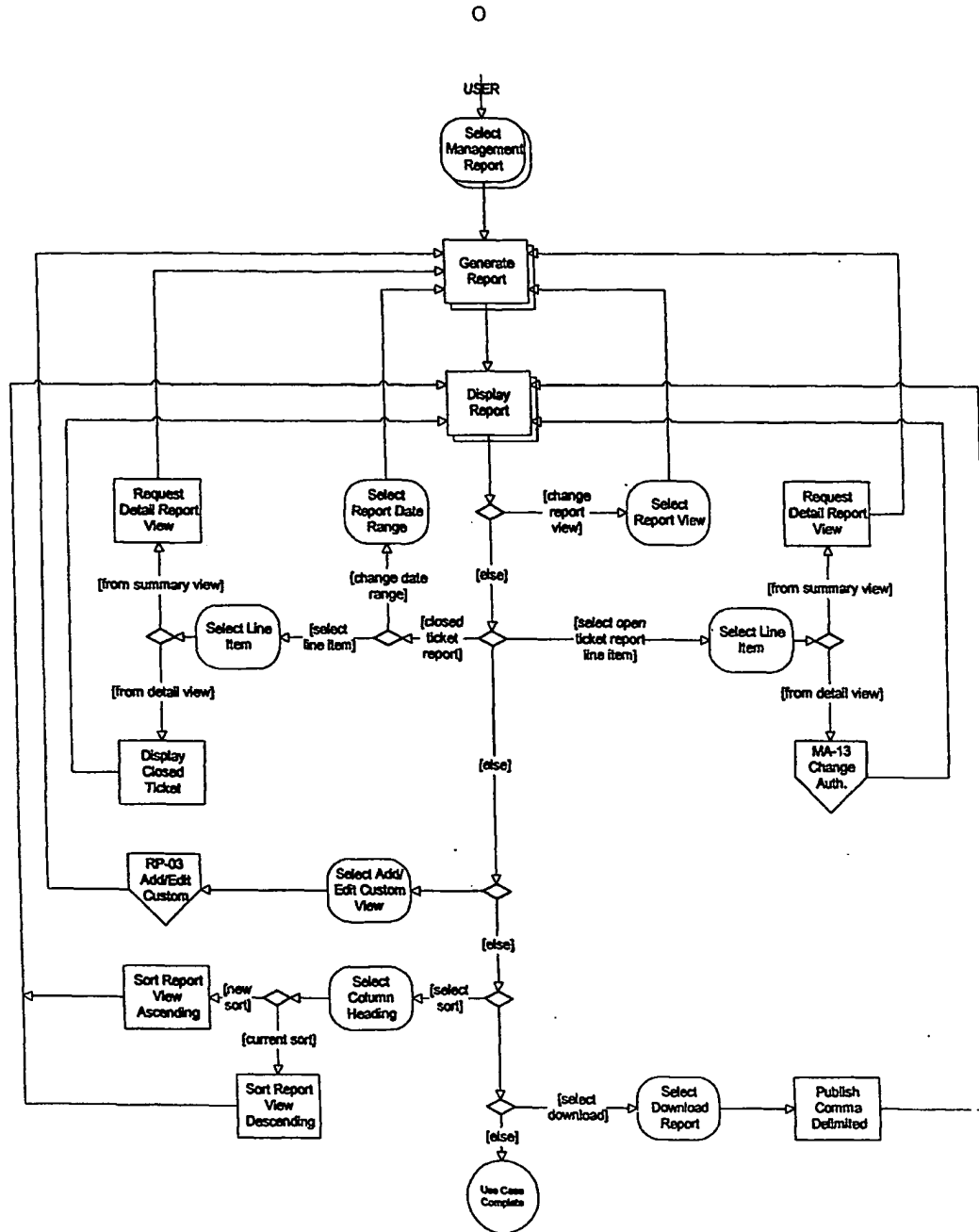
1.4 Flow of Events

The Flow of Events includes all the steps necessary to generate management reports in the ARMS Web system.

¹ Users may be granted access to management reporting capabilities through their user profile, even if they are not considered 'managers' in the ARMS Web system.

1.4.1 Activity Diagram

Generate Management Report Activity Diagram



1.4.2 Basic Flow

The Basic Flow of the Generate Management Report use case includes all of the required activities for the USER to successfully generate and view a management report using the on-line reporting functionality in ARMS Web.

1. The USER selects to generate a management report from top navigation.
2. The system generates a Closed Ticket Summary report by Adjuster for the USER. Management reporting USERS will have the ability to request additional summary or detail reports for:
 - a. The office as a whole (by Office)
 - b. The adjusters within an office (by Adjuster)
 - c. The repair facilities doing business with a claims office (by Repair Facility)
3. The system displays the report to the USER.
4. This ends this use case.

1.4.3 Alternative Flows

The Alternative Flows of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Change Report View

At Step 6 of the Basic Flow, the USER will have the ability to change the report 'view'². Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope.

If the USER selects to change the report view, the system will return to Step 5 of the Basic Flow and re-generate the report to build the requested view. NOTE: The USER may also change the Report By criteria to request a new report view (e.g., request a report by Adjuster, Office, or Repair Facility).

1.4.3.2 Change Closed Ticket Date Range

At Step 6 of the Basic Flow, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will not have the ability to select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 5 of the Basic Flow and re-generate the report to build the USERs closed ticket report for the selected date range.

This applies to both summary and detail views of closed ticket reports.

² Report views are covered in more detail in Section 1.6 Special Requirements.

1.4.3.3 Select Summary Line Item from Open Ticket Summary Report

At Step 6 of the Basic Flow, if the current report view is an open ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were an Open Ticket Summary for Adjusters within an office (Open Summary by Adjuster), the USER would have the ability to select an adjuster from the summarized report and review the Open Ticket Detail report for that adjuster. This 'drill-down' capability must be available for all report types (by Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the Basic Flow and generate the Open Ticket Detail report view for the selected item. From the Open Ticket Detail, the USER will have the ability to return to the Open Ticket Summary or to continue reviewing the Open Ticket Detail report views for each adjuster/repair facility within the office.

1.4.3.4 Select Open Ticket from Open Ticket Detail Report

At Step 6 of the Basic Flow, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 6 of the Basic Flow).

1.4.3.5 Select Summary Line Item from Closed Ticket Summary Report

At Step 6 of the Basic Flow, if the current report view is a closed ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were a Closed Ticket Summary for Repair Facilities within an office (Closed Summary by Repair Facility), the USER would have the ability to select a repair facility name from the summarized report and review the Closed Ticket Detail report for that repair facility. This 'drill-down' capability must be available for all report types (by Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the Basic Flow and generate the Closed Ticket Detail report view for the selected item. From the Closed Ticket Detail, the USER will have the ability to return to the Closed Ticket Summary or to continue reviewing the Closed Ticket Detail report views for each adjuster/repair facility within the office.

1.4.3.6 Select Closed Ticket from Closed Ticket Detail Report

At Step 6 of the Basic Flow, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file. When selected, the system will present the USER with the closed customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be returned to the closed ticket detail report (Step 6 of the Basic Flow).

1.4.3.7 Sort Report

At Step 6 of the Basic Flow, the USER will have the ability to select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle between ascending and descending sort order by re-selecting the

currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted ascending by renter last name. If the USER would like to reverse the sort order to descending, selecting the column heading again would allow the report to be resorted descending by renter last name.

The system will return the USER to Step 6 of the **Basic Flow** on completion of this **Alternative Flow**, with the report view resorted according to the USER request.

1.4.3.8 Add/Edit Custom View

At Step 6 of the **Basic Flow**, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

On completion of the use case extension, the USER will be returned to Step 5 of **Basic Flow** in this use case and be presented with the custom report layout that was defined/modified.

1.4.3.9 Select Download Report

At Step 6 of the **Basic Flow**, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- Report View (open ticket detail/closed ticket detail)
- Name of the Adjuster
- Date and time the report was generated

The system should return the USER to the report view (Step 6 of the **Basic Flow**) once a report has been successfully downloaded.

1.5 Post-Conditions

- If successful, a standard report is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERS in two ways:

- 'Standard' reporting views that have been defined by Enterprise at the request of customers
- 'Custom' reporting detail views that allow the USER to define the columns of data that they would like to be present in a report

1.6.1 Standard Management Reporting Views

Standard management reporting views are views that have been defined by Enterprise based on the requests of customers. These views will be carried forward in to ARMS Web and are defined in this section.

The table below includes the detailed data fields that are available on each of the 'standard' management reports. The columns available in each report have been expanded somewhat over the current state, as the web environment offers more flexibility to provide additional information than the current state green screen application. The sequence of columns that must be presented in each report are indicated using the number 1-10, with fields that are on the screen but not in the primary data table indicated with an 'X'. For example, the first column in the 'Adjuster – Open Detail' report is the renter name, the second column is the claim number, etc.

Report Sorted By									
	Open Summary	Closed Summary	Open Summary	Closed Summary	Open Summary	Closed Summary	Open Summary	Closed Summary	
Adjuster Name	1	1							
Renter Name									
Claim Number									
Claim Type									2
Authorized Days*	5	5	5	5	5	5	5	5	
Authorized Rate*	3	3	3	3	3	3	3	3	
Rental Days*	4		4		4		4		
Billed Days*+									
Days Behind*	6		6		6		6		
Number of Extensions*	7	6	7	6	7	6	7	6	
Surcharges									
Authorized Amount*	8		8		8		8		
Amount Received*		8		8		8		8	
Total Charges*		7		7		7		7	
Billed Amount*		9		9		9		9	
Total Contracts	2	2	2	2	2	2	2	X	
Repair Facility Name			1	1					
Repair Facility Telephone									
Office Name							1	X	
Month/Year									1

+ Not available in current state system. Being implemented by the ARMS Maintenance team.

1.6.1.1 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.

1.6.1.2 The default sort for the Open Ticket Detail views must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.

1.6.1.3 The default sort for the Closed Ticket Detail views must be by Claim Number.

1.6.1.4 The default sort for the Open Ticket Summary views must be by Adjuster Name (if by Adjuster), Repair Facility Name (if by Repair Facility), or Office Name (if by Office)

- 1.6.1.5 *The default sort for the Closed Ticket Summary views must be by Adjuster Name (if by Adjuster), Repair Facility Name (if by Repair Facility), or Month/Year (if by Office)*
- 1.6.1.6 *Any items in an Open Ticket Detail view that have a value greater than zero (0) in the Number of Days Behind field should be highlighted to the USER.*
- 1.6.1.7 *All report views must include a count of the total number of contracts listed.*
- 1.6.1.8 *The report view must include report header information (in both screen and downloaded versions) that includes:*
 - the type/name of the report view (e.g., open ticket detail, open ticket summary)
 - the name of the entity that is being reported on. For summary views, this should always be the office name. For detail views, the entity name must be:
 - the adjuster name (for reports by Adjuster)
 - the office name (for reports by Office)
 - the repair facility name (for reports by Repair Facility)
 - the date/time the report was generated

1.6.2 Custom Management Reporting Views

Custom management reporting views allow the USER to define the fields that they would like to use to build their own report. The fields selected by the USER become the columns of the report, and the system will not limit the number of columns that a USER can request as part of the report. Custom reporting views are discussed at length in use case RP-03 Add/Edit Custom View.

1.6.3 Report View Management

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will not be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

1.7 Extension Points

This section describes the extension points of this use case.

1.7.1 MA-13 Change Authorization

If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report Alternative Flow on page 4 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 6 of the Basic Flow within this use case.

1.7.2 RP-03 Add/Edit Custom View

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View Alternative Flow on page 5 for additional detail). The USER will define or modify their custom report layout and be returned to Step 6 of the Basic Flow within this use case.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Management Report View Template

This screen provides the USER with a management report view template, and supports Step 6 of the Basic Flow.

2.1.1 Screen Layout

Welcome to the
Automated Rental Management System

Office: 001 Handling for: Yourself

Management Reports: for <Report By> as of <Time/Date Stamp>
<Report Type>
[Choose a different report](#)

[Click on the column heading to sort](#) [Go to Report Averages](#)

<Column 1>	<Column 2>	<Column 3>	<Column 4>	<Column 5>	<Column 6>	<Column 7>	<Column 8>	<Column 9>	<Column 10>
1 Walker, L.	12345678901234567890	Injured	15	13	1	2	20.00	YES	\$260.00
Ortley, J., K.	12345678901234567890	Claimant	10	13	0	0	18.00	NO	\$220.00
Lankford, R.	12345678901234567890	Claimant	7	15	0	0	23.00	YES	\$350.00
Totals: 6 Customer Files			Averages	7.16	13.33	.33	0.5	21.32	\$265.00

[top of page](#) [Download this report](#)

<<< Previous <Report By> Go to: <Next Report By Item> Next <Report By> >>>

View a different report:
Report by: Adjuster

Select a view: Open Ticket Summary

Show Only: All Claim Types

For Closed Tickets, please select a time period:
From: January 2000 To: March 2000

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2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	This combo list should include all of the offices for the currently active company that the USER is assigned to. If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office.
Handling for	Output Text		Handling for	For management reports, this value should always be 'Yourself'.

Screen Label	Type	Length	Data Field	Screen Specific Rule
	Output Text		<Report By>	The <report by> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the entity that is being reported on (i.e., Adjuster Name, Office Name, or Repair Facility Name).
	Output Text		<Time/Date Stamp>	The <time/date stamp> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the date and time that the report was generated.
	Output Text		<Report Type>	The <report type> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)
<Column Heading 1 through X>	Output Text		<Data Columns 1 through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/customer files that are represented in the report.
Go to	Combo Box		Report sorted by navigation	<p>The 'Go to' combo box should include all of the entities available in the current report. For example, if the report were an Open Ticket Detail view Reported By Adjuster, this list would include all of the Adjusters that would PAGE in the list.</p> <p>The 'Go to' combo box should only be available in detail views.</p>
Report by	Combo box		Report sorted by	The 'Report by' combo box should include all of the currently available report by options in the ARMS Web system. The report by options for the initial release of ARMS Web 2.0 should be: 'Office', 'Adjuster', and 'Repair Facility'
Select a view	Combo Box		Report view selection	<p>The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views.</p> <p>There should be an additional option to 'Add a custom view...'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
Show Only	Combo Box		Claim Type Filter	<p>The 'show only' combo box should include the following values:</p> <ul style="list-style-type: none"> • All Claim Types (default) • Insured Claim Types • Claimant Claim Types • Uninsured Claim Types • Theft Claim Types <p>When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured'.</p>
From	Combo box		Closed ticket report from date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'.</p> <p>The default value should be the month prior to the current month.</p>
To	Combo box		Closed ticket report to date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'.</p> <p>The default value should be the current month.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column

heading, the system will resort the report view by the column selected in ascending order. If the sorted column is selected by the USER, the system will resort the report in descending order.

2.1.3.4 Previous <Report By>

The 'Previous <Report By>' screen function allows the USER to navigate to the previous detail record in a particular detail report. For example, if the report view were an Open Ticket Detail report by Repair Facility, the 'Previous <Report By>' screen function would allow the USER to move to the previous Repair Facility detail record in a report. This screen function should only be available on open or closed ticket detail views (including custom views), and should only be available if a previous report by item exists (i.e., we wouldn't have a previous item if we were on the first item in the list).

2.1.3.5 Next <Report By>

The 'Next <Report By>' screen function allows the USER to navigate to the next detail record in a particular detail report. For example, if the report view were an Open Ticket Detail report by Adjuster, the 'Next <Report By>' screen function would allow the USER to move forward to the next Adjuster's detail report view within the office. This screen function should only be available on open or closed ticket detail views (including custom views), and should only be available if a next report by item exists (i.e., we wouldn't have a next item if we were on the last item in the list).

2.1.3.6 Download this report

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

- ❖ Report Header Information
 - Name of the Report View
 - Name of the Person
 - Date and Time that the Report Was generated
- ❖ Report View Column Headings
- ❖ Report View Records

2.1.3.7 View Report

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.8 Edit Custom View

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.

Enterprise Rent-A-Car

Functional Design Specification Add/Edit Custom View

Version 1.1

Last Saved: 7/24/00 1:21 PM

ARMS Redesign Project - Release 2.0
Add/Edit Custom View

Issue: 1.1
Issue Date: 8/9/2000

Revision History

Date	Issue	Description	Author
2000-07-06	0.1	Initial draft published to design team for review and comment.	Sean O'Donnell
2000-07-23	0.2	Added the screen design section to the document with designs received from Marketing	Sean O'Donnell
2000-07-24	1.0	Version published to application build team for construction.	Sean O'Donnell
2000-08-09	1.1	Updated the specification with changes recommended by the business and build teams.	Sean O'Donnell

ARMS Redesign Project - Release 2.0
Add/Edit Custom View

Issue: 1.1
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Add/Edit Custom View

1. Generate Management Report

1.1 Brief Description

The Add/Edit Custom View use case describes the process to add or edit a custom report view in the ARMS Web system. Custom views allow the USER to select the data columns that they would like to view in a report (from a pre-defined list of available fields). USERS will have the ability to access their custom views just as they would any other 'standard' report view.

1.2 Use Case Actors

All actors will use the use case to add or edit a custom report view(s) in the ARMS Web system. All of the following actors can be defined generically as a USER:

- ADJUSTER
- COMPANY MANAGER

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

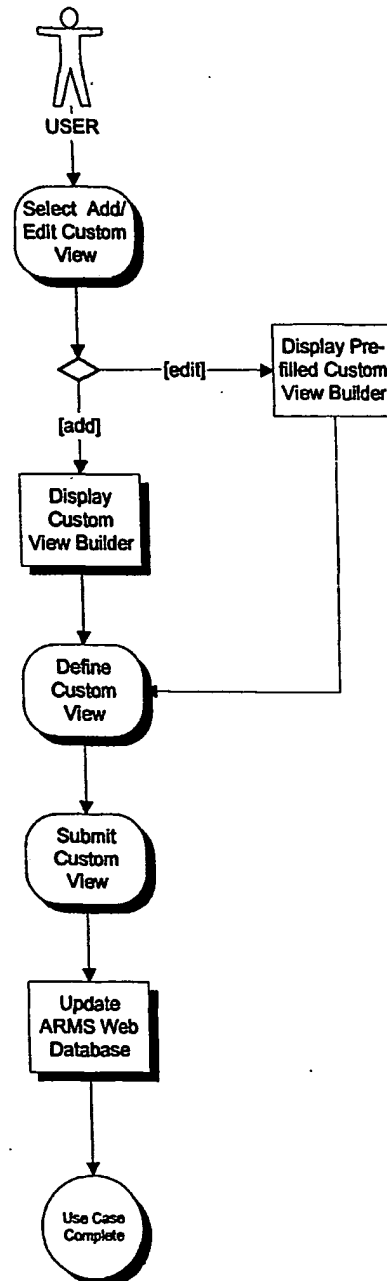
- The USER must be signed-on to the system.
- The USER must have the on-line reporting functionality active (i.e., must be on an on-line reporting screen).

1.4 Flow of Events

The Flow of Events includes all the steps necessary to add or edit a custom report view in the ARMS Web system.

1.4.1 Activity Diagram

Add/Edit Custom View Activity Diagram



1.4.2 Basic Flow

The Basic Flow of the Add/Edit Custom View use case includes all of the required activities for the USER to successfully add or edit a custom report view for use in the on-line reporting functionality of ARMS Web.

1. The USER selects to add or edit a custom report view from the on-line reporting screen(s).
2. The system displays a screen that allows the USER to define or build a custom report view.
3. The USER defines the custom report view. The USER will have the ability to indicate a Name for the view, and define the data columns that they would like to have reported. The comprehensive list of data columns that will be available to the USER can be found in Section 1.6 Special Requirements (on page 4).
4. The USER will submit the custom view to the system.
5. The system will update the ARMS Web database.
6. This ends this use case.

1.4.3 Alternative Flows

The Alternative Flows of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Edit Custom Report View

At Step 1 of the Basic Flow, if the USER selected to edit a current custom report view, the system will present the screen to define/build a custom report and pre-fill all fields with the current report definition. For example, if the USER were editing their 'Massive' custom report view, 'Massive' would appear in the report name field and all of the data columns that were previously defined as the massive report would appear in the 'selected columns' portion of the screen.

1.5 Post-Conditions

- If successful, a custom report view is created for the USER.
- If unsuccessful, the system state remains unchanged.

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Add/Edit Custom View

Issue Date: 8/9/2000

1.6 Special Requirements

The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERS in two ways:

1.6.1 Custom Report Definition

This section provides the system framework for custom report view definition in the ARMS Web system. These are additional requirements around functionality to allow USERS to define/build custom report views, and apply to the use case as a whole.

- 1.6.1.1 *USERS will have the ability to create one or more custom views.*
- 1.6.1.2 *USERS will be able to define custom report views for DETAIL views only (USERS will not have the ability to define custom summary views¹).*
- 1.6.1.3 *USERS will have the ability to select custom report views by Office, by Adjuster, or by Repair Facility (similar to the standard management reports).*
- 1.6.1.4 *Custom report views will be limited to the data columns in the Custom Report View Data Domain (see 1.6.2 Custom Report View Data Domain)*
- 1.6.1.5 *Custom report views must define if the report view retrieves Open, Closed, or All Ticket statuses.*
- 1.6.1.6 *All custom report views defined as 'closed ticket only' must allow the user to indicate a date range. The default date range for custom views will be the same as the default range for standard closed ticket reports (the current month plus two (2) prior months).*
- 1.6.1.7 *When a custom report view has been defined, the name of the custom report view will become a selection from the USERS view list. For example, 'MyCustomView' would be seen in the list with 'Open Ticket Detail', 'Closed Ticket Detail', etc..*

¹ Most of the numeric fields that can be summarized for USERS are already provided in the standard management report views.

ARMS Redesign Project - Release 2.0
Add/Edit Custom View

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Issue Date: 8/9/2000

1.6.2 Custom Report View Data Domain

The following is a list of all available data columns that a USER may select as part of a custom report view. The number of columns that a USER selects to make part of the custom report view is not limited, which allows the USER to select a subset or all of these data fields to be published in their report.

Adjuster	Claim Number	Claim Type
Office Name	Renter Name	State of Rental Location
Authorized Days	Authorized Rate	Policy Daily Rate
Days Behind	Number of Extensions	Policy Maximum Rate
Rental Days	Billed Days	Billed to %
Repair Facility Name	Insured Name	Rental Status
Total Charges	Billed Amount	Amount Received
Other Charges	Vehicle Condition (Driveable Flag/Repairable Flag)	Authorized Total Amount
Surcharges Flag	Rental Start Date	Rental Close Date
Termination Date	Invoice Date	Invoice Approved Date
Remittance Date	Repair Facility Phone Number	

1.7 Extension Points

None.

ARMS Redesign Project - Release 2.0
Add/Edit Custom View

Issue: 1.1
Issue Date: 8/9/2000

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Add/Edit Custom View

This screen provides the USER with the ability to add or edit a custom view, and supports Step 2 of the Basic Flow.

2.1.1 Screen Layout

Reports: Office: [001] Handling for: [Yourself]

Add a new report view:

Name this report:

Start from a View: [Closed Ticket Detail] (optional)

Ticket Status: [Closed Tickets]

Select fields to display on report

Available Fields		New Report Fields
Renter Name		Adjuster Name
Claim Number		Other Charges
Claim Type		Repair Facility
Billed Days		Rental Days
Auth. Days		Rental Status
Auth. Rate		Office
Number of Extensions		Rental Open Date
Total Charges		Rental Close Date
Renter Charges		
Total Billed Charges		

Save this report view | Close without saving | Delete this report

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Add/Edit Custom View

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2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Name this report	Text		Custom Report Name	<p>The name a USER provides to refer to the custom report view definition.</p> <p>The name of the report must be unique to other custom reports defined by the user (e.g., a single user can not have two reports with the same name). This uniqueness must only be enforced at the user level (e.g., two different users CAN use the same name for a report).</p> <p>The name of the report will appear in the USERS 'Select a view' combo box when the report view is saved.</p>
Start from a View	Combo box		Custom view start point	<p>The 'Start from a View' combo list allows a USER to select a default or 'standard' view as a starting point in report view definition. The values within the combo box should be 'Open Ticket Detail' and 'Closed Ticket Detail'. If selected, the system should use the values of the Report by 'Adjuster' standard report to pre-populate the 'New Report Fields' list box..</p> <p>The default value of this field should be '-Select a Starting View-'</p>
Ticket Status	Combo box		Custom view ticket status	<p>The 'Ticket Status' combo box indicates the scope of the report in terms of ticket status. The list should include 'Open Tickets', 'Closed Tickets', and 'All Tickets'. The system will use this as part of the overall custom report definition.</p>
Available Fields	List Box		Custom view available fields	<p>The 'Available Fields' list box includes all of the fields that are available to be included in a custom view, but have not yet been selected to be included in the report.</p> <p>When an available field is selected from the list to be included in the report, the field should be removed from this list box (and populate the 'New Report Fields' list box).</p> <p>For a list of all available fields see Section 1.6.2 Custom Report View Data Domain above.</p>

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Screen Label	Type	Length	Data Field	Screen Specific Rule
New Report Fields	List Box		Custom view selected fields	<p>The 'New Report Fields' list box includes all of the fields that have been selected by the USER. These fields define the columns of the report.</p> <p>The sequence that the fields appear in the report is defined from top to bottom of this list box (e.g., the first field in the list = the first column in the report). This sequence can be modified using the Sequence Up and Sequence Down screen functions (see 0 Screen Function Definition below).</p> <p>If the USER selects a starting view (from the Start from a View field), the list box will populate with all of the fields that make up the standard view selected (e.g., if the USER selects 'Closed Ticket Detail' from the Start from a View field, all of the fields that make up a Closed Ticket Detail report would populate in this field.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Remove

The 'Remove' screen function allows a USER to remove selected fields from the 'New Report Fields' list box (and re-add them to the 'Available Fields' list box).

2.1.3.2 Insert

The 'Insert' screen function allows a USER to add selected fields to the 'New Report Fields' list box (and remove them from the 'Available Fields' list box).

2.1.3.3 Dictionary

The 'Dictionary' screen function allows a USER to open a dictionary that defines all of the fields that can be added to a report view. The dictionary will be included as part of the help functionality of the system.

2.1.3.4 Sequence Up

The 'Sequence Up' screen function (presented with an 'up' arrow in the screen shot) allows a USER to move a selected field in the 'New Report Fields' list box up in the sequence of the report.

2.1.3.5 Sequence Down

The 'Sequence Down' screen function (presented with a 'down' arrow in the screen shot) allows a USER to move a selected field in the 'New Report Fields' list box down in the sequence of the report.

2.1.3.6 Save Report View

The 'Save Report View' screen function allows the USER to save the custom report definition and return to the reporting use case(s). The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02) and be presented with the newly defined report view.

2.1.3.7 Close without Saving

The 'Close without Saving' screen function allows the USER to exist the screen with saving any changes made. The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02).

2.1.3.8 Delete

The 'Delete' screen function allows the USER to delete a custom report view from their profile. When a custom report view is deleted it should no longer be available in the USERs view selection combo box. The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02).

Enterprise Rent-A-Car

Functional Design Specification Maintain User

Version 1.3

Last Saved: 8/18/00 1:02 PM

Maintain User

Issue: 1.2
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
3/29/00	1.0	Subdocuments merged into master document	Brad Reel, Anil Kabra, Russ Dittmar, Deborah Ealick, Johnny Sands, Gary Thomae, Cindy Bastean
4/4/00	0.2	Revisions after cross team review and inter-team final review	Brad Reel, Deborah Ealick, Cindy Bastean
July 5, 2000	1.0	Re-write to update based on iteration one feedback	Brad Reel
September 15, 2000	1.2	Modified to reflect resolved issues	Brian Weingart
September 25, 2000	1.3	Updated screens and specs	Brian Weingart

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Maintain User

1. Maintain User Use Case

1.1 Brief Description

The Maintain User use case describes how a USER would set up or maintain a user in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR is a person who can perform this use case to set up any user in a company.
- **COMPANY ADMINISTRATOR** – *The COMPANY ADMINISTRATOR is a person who can perform this use case for the company. They may add users and assign them to office(s) that they are the administrator of within the company.*
- **OFFICE ADMINISTRATOR** – The OFFICE ADMINISTRATOR is a person who can perform this use case for the company. The OFFICE ADMINISTRATOR may maintain any user in their company structure to which they have been assigned ownership.

1.3 Pre-Conditions

- The USER must be logged into the system.
- If maintaining a user, the USER should have the ability to maintain that user. In order to maintain a user at a specific office, the ADMINISTRATOR must have access to that specific office.
- If adding a user, the USER should have the ability to add a user.

1.4 Flow of Events

The Flow of Events will include all the steps necessary to add or maintain a company user in the ARMS Web system.

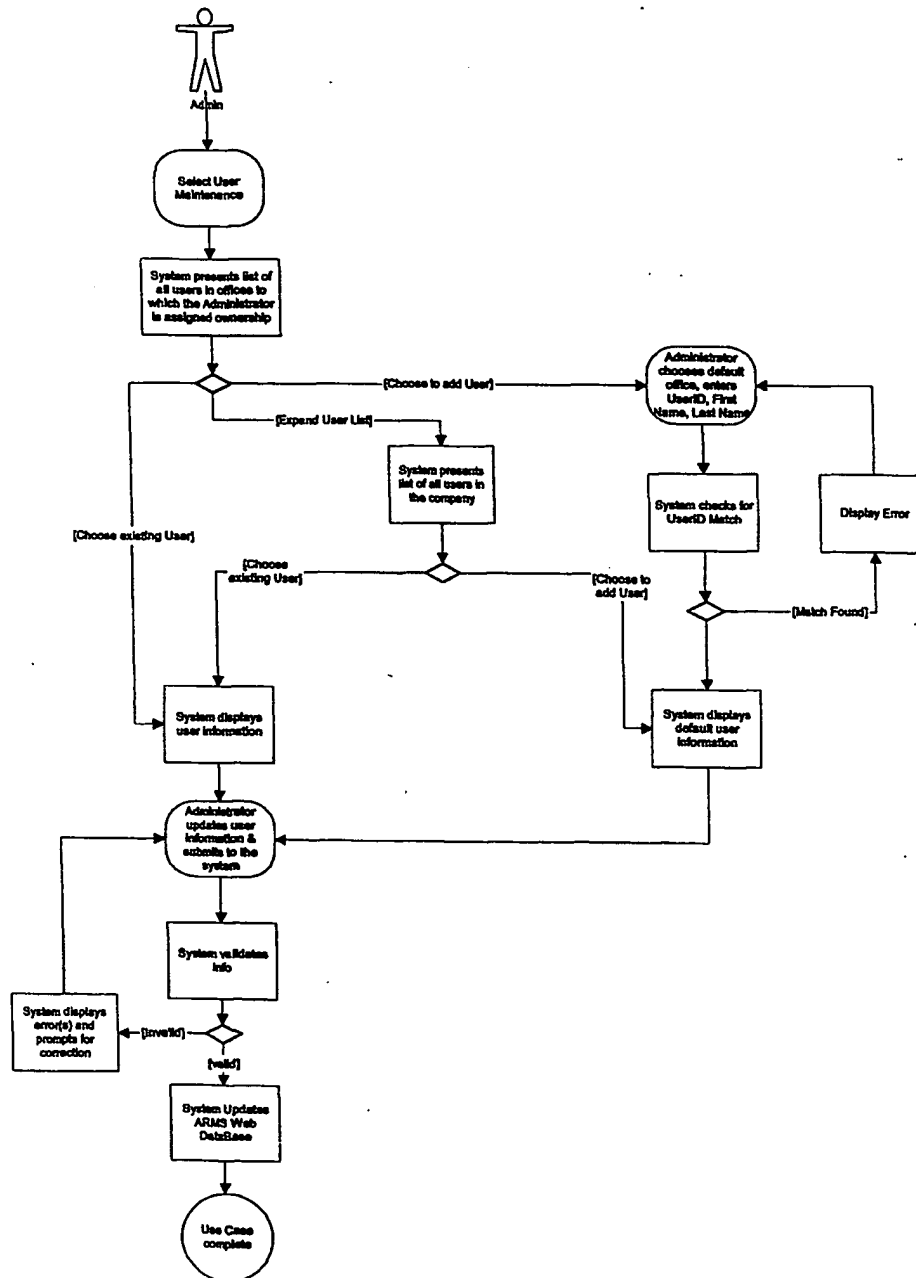
Maintain User

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1.4.1 Activity Diagram

Maintain User Activity Diagram



9/14/00

Y:\APPS\ARMSWeb\Application\@dkb\ARMS Web\Release One\PR-Profiling\PR-05-Maintain User\ACTIVITY DIAGRAMS\PR-05 MAINTAIN USER.VSD

1.4.2 Basic Flow

The Basic Flow will describe how a USER will maintain a user in the ARMS Web system.

1. The USER will choose to maintain user(s).
2. The system will present a list of all users that are in all the offices the USER has access to maintain.
3. The USER will choose a user to maintain.
4. The system will display the user's information for the USER to edit.
5. The USER will update the user's information and submit the information to the system.
6. The system will validate the information entered.
7. The system will update the ARMS Web database.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Add User

At step three in the Basic Flow, the USER may choose to add a user, if they have the authority level to do so. The USER will enter a primary office, UserID, First Name and Last Name for the new user. The system will then validate that the office was entered and the UserID does not exist. If a UserID match is found, or the office was not entered, the system will display an error and request the USER enter a new UserID. Otherwise, the system will display the default settings for a new user; the USER will update the default settings and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2 Show All Users for the Company

At step three in the Basic Flow, the USER may choose to display all users within the company. This would allow for adding users to offices the USER controls. The USER will choose the user they wish to work with and the system will then display the user's information; the USER will add the user to any offices the USER controls and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

- 1.4.3.2.1 If a user's primary office is not an office controlled by the USER, the USER may only add the user to offices the USER controls. The USER should not be able to change any of the user's settings. A USER that has control of a user's primary office can only change user settings.

1.4.3.3 User Information Validation Fails

In step six of the Basic Flow, the system may find that user information entered by the USER does not meet the validation criteria. The system should return the USER to step four of the Basic Flow, show the USER the invalid data, and prompt the USER to reenter the data.

This rule also applies for new user creation. Whenever a new user is submitted to the system for creation, the system must validate that the criteria entered is valid. If any information is invalid, the system should present the invalid data to the USER, and prompt the user to correct it.

- 1.4.3.3.1 The following fields must be populated to complete a user update or new user creation.

- Last Name
- First Name
- UserID (Must be validated to ensure it is not a duplicate ID)
- Home Office (Must be a valid office and not null)

1.4.3.4 Cancel Add / Maintain User

Until step five in the Basic Flow, the USER may choose to cancel the use case. The system

should not store any changes made by the USER within the use case.

1.5 Post-Conditions

- If the use case was successful and the USER was maintaining a user, the user criteria being changed will have been changed and updated in the ARMS Web system.
- If the use case was successful and the USER was adding a user, the user will have been added in the ARMS Web system.
- If the use case was unsuccessful, the system state will be unchanged.

1.6 Special Requirements

1.6.1 User Inactivation

In order to inactivate a user, the following set of criteria must be validated. If any of the criteria are found to be true, then the system will not allow the USER to inactivate the user.

- If A4XREFL1/X4STCD is equal to 'C' (closed rental) and any tickets were closed in the past seven days
- If A4XREFL1/X4STCD is equal to 'A' (audited invoice)
- If A4XREFL1/X4STCD is equal to 'R' (reservation)
- If A4XREFL1/X4STCD is equal to 'O' (open contract)
- If A4XREFL1/X4STCD is equal to 'U' (unconfirmed) and A4XREFL1/X4RSFG is equal to 'D' (Direct Bill request)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'C' (extension request & message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'M' (authorization message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'X' (extension request sent)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'B' (invoice sent from ARMS)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'R' (invoice returned to adjuster)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'E' (rejected system error)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'Q' (rejected invoice ARMS researching)

1.6.2 User Default Settings

Whenever a new user is created, the settings for that user should be defaulted based on the user's primary office profile settings. For example, if the office is a reservation only office, the user should default to reservation only. This does not imply that the administrator cannot change the settings. This should also apply to whether can receive work setting should be on or off for the user/team. If all other users/teams in the office have the setting either on or off, then the new user should mimic this setting. Once again, this does not imply that the administrator cannot change this setting.

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Create or Modify User

This screen will allow the USER to search for and select a user to modify or select to add a new user.

2.1.1 Screen Layout

2.1.2 Create or Modify User

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
User ID:	Input	10	User Id	ARMS Profile ID	
First Name:	Input	15	First Name of New User	First Name	
Handling For	Output	30	Handling For	First Name + Last Name	
Last Name:	Text Box	20	Last Name of New User	Last Name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User ID	Output	10	List of User Ids within the company	Adjustor Code	
Name	Output	30	List of Users within a Company	First Name + Last Name	
User ID:	Input	10	User Id	Adjustor Code	
Primary office	List Box	25	Primary office	external organization name	
Primary office	Output	10	List of Primary offices	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions within Company	external organization name	
Office:	Output	4	Office Id	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.1.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.1.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new user (Office, Last Name, First Name UserID). If the information is entered, the system will create a new user with those attributes and the other user attributes defaulted. The system should then display the new user's profile.

Maintain User

Issue: 1.2
Issue Date: 10/20/00**2.2 Creat or Modify Team**

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.2.1 Screen Layout
2.2.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User		
Name	Output	20	Adjusters Associated with the Company	First Name + Last Name	
Handling For	Output	20	Handling For	First Name + Last Name	
User ID	Output	7	List of User Ids Associated with a Company	Adjustor Code	
Primary office	List Box	20	Primary office associated with Team	external organization abbreviated name	
Primary office	Output	10	List of Primary offices Associated with a Company	external organization abbreviated name	

Maintain User

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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Office Description	Output	20	List of Office Descriptions associated with a comp	external organization name	
Office	Output	10	Office	external organization abbreviated name	
Team Name	Input	15	Team Name	external organization name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.2.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.2.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new team (Office, Team Name). If the information is entered, the system will create a new team with those attributes and the other user attributes defaulted. The system should then display the new team's profile.

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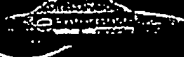
Maintain User

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2.3 User Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.3.1 Screen Layout



Welcome to the
Automated Rental Management System

[Create a RESERVATION](#)
[find a CUSTOMER](#)

Claims Office: 001
Handling for: Yourself

Administration:
MODIFY USER

User Information:

Office:

001
002
003
004
005

Selected Office

Authorizations:

Work Authority:

☒
☒
☒
☒
☒

☐ Top of page

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2.3.2 User Profile

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reset Password	Check Box	1	Reset Password Indicator		

Maintain User

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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Email Address:	Text Box	15	Adjuster's Email Address	e-Mail address	
First Name	Text Box	15	First Name	First Name	
Handling For	Output	10	Handling For	First Name + Last Name	
Last Name	Text Box	10	Last Name	Last Name	
User ID:	Output	0	User Id	Adjustor Code	
Active	Check Box	1	User is Active	Status:Active/Inactive	
Address	Output	25	Home Office Address	Customer Address Line 1+ Customer Address Line 2	
Phone:	Output	10	Home Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Home Office Postal Code	Zip Code	
City	Output	15	Home Office City	customer city text	
ST/PROV	Output	5	Home Office State	customer state code	
Office	Output	10	Office	external organization abbreviated name	
Home Office	List Box	20	Office Name	external organization name	
Other authorized Offices	List Box	20	Other authorized Offices for The User	external organization name	
Allow files and action items to be assigned to this user	Check Box	1	Allow files & action items to be assigned to user	profile type value code	If Allow Files and Action Items have been selected, this user or team will appear in the Handle For list.
Authorize/Extend Rental	Check Box	1	Allow user to Authorize/Extend Rental	profile type value code	
User Maintenance	Check Box	1	Allow user to conduct user maintenance	profile type value code	
Create Reservation	Check Box	1	Allow user to create reservation	profile type value code	
Reporting (Management)	Check Box	1	Allow user to do reporting	profile type value code	
Pay Invoice	Check Box	1	Allow user to Pay Invoices	profile type value code	
Days/Rental	Text Box	10	Authorization Limit on Days per Rental	profile type value quantity	
\$ ____ max/rental	Text Box	10	Authorization Limit on Maximum Dollars per Rental	profile type value amount	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced.
Upon completion, the system will return the USER to the Create a New User / Team page.

2.3.3.1.1 The user must have a First Name, Last Name and Home Office entered. The Home Office must be a valid office for that company.

2.3.3.1.2 Work Authority for each user will default to all enabled.

2.3.3.1.3 If the Active switch has been set to inactive, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the user to be set to inactive. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to inactivate the user.

2.3.3.1.4 If the reset password option is set, the system will reset the user's password. This will reset the user's password to the password used for new users. **Need to verify what that password is.**

2.3.3.1.5 If the File Ownership flag is turned off, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to turn off file ownership.

2.4 Team Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.4.1 Screen Layout

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Y

Administration:
MODIFY TEAM

Team Information:

Office:

Team Members:

- Frank Rizzo
- Phil Connors
- Nad Ryerson
- Ragis Phabin
- Rex Kramer
- Jeff Everson
- Doris Pickarill
- David Fereday
- Odenis Urungus
- Fictus Maximus
- Johnny B. Good
- Captain Covenen

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Maintain User

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2.4.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Allow files and action items to be assigned to this team	Check Box	1	Allow action items to be assigned to team		
Available	List Box	30	Available Members for Team	First Name + Last Name	
E-mail Address	Text Box	20	Email Address	e-Mail address	
Handling For:	Output	20	Handling For:	First Name + Last Name	
Active	Check Box	1	Team Active Indicator	Status:Active/Inactive	
Team Members	List Box	30	Team Members	First Name + Last Name	
Phone Number	Output	10	Branch Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Branch Office Postal Code	Zip Code	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
ST/PROV	Output	3	Branch Office State or Province	customer state code	
City	Output	15	Home Office City	customer city text	
Home Office	Output	20	Home Office Name	external organization name	
Office	Output	5	Office	external organization abbreviated name	
Team Name	Text Box	20	Team Name	external organization name	

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.4.3.1.1 The team must have a Team Name and Home Office entered. The Home Office must be a valid office for that company.

2.4.3.1.2 If the Active switch has been set to inactive, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the team to be set to inactive. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to inactivate the team.

2.4.3.1.3 If the File Ownership flag is turned off, the system will check to see if the team

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owns any open work. If the team owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to turn off file ownership. If the user or team does not receive File Ownership, that user or team will not display in the Handle For list.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Build list of Users

(Office Id, First Name, Last Name, User ID)

Build a list of User first and last names NOT limited to a given office in order to search for a user. Limited by the first or last name passed.

3.2 Find User Information

(User Id)

Retrieve the current values for a user's profile.

3.3 Update User Information

(User Id, Name, e-mail Address, Out of Office, Handler for out of office user, Initial Page, Is user Multi-company, Is User Active, Current Password, New Password, Receive Authorization Assignment)

Update the given data values for the user profile.

3.4 Build list of User offices

(User Id)

Build a list of office names for the offices the user is assigned to.

3.5 Find User Office Information

(User Id, Office Id)

Retrieve the current values assigned for the user at a given office.

3.6 Update User Office Information

(User Id, Office Id, and data values)

Update the given data values for the user profile.

3.7 Add User Office Information

(User Id, Office Id)

Assign user access to another office. Default values are set for the users access.

3.8 Remove User Office Information

(User Id, Office Id)

Revoke assignment of the user to an office. The user cannot be revoked from their primary office

3.9 Build a list of users to which the administrator has access

(Company ID, Administrator ID, User ID)

Build a list of User first and last names limited to a given office in order to maintain a user. Limited by the first or last name passed.

3.10 Validate that User ID does not exist

(User ID)

Verify that the administrator must add a new user.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 User Language Preference

This is the user's language preference while working with the ARMS Web System.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.2 Phone Number

This is the user's phone number.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.3 Profile Attribute Id

LS. assigned identifier for a profile attribute. Must be unique and non-blank. Each profilable item will have a profile attribute.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.4 Last Name

This is the last name of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.5 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric
Data Field Length: 0
Data Source: <Data Source>

4.1.6 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL
Data Field Length: 256
Data Source: <Data Source>

4.1.7 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.8 Is the user multicompany ?

This flag indicates that this user can do work for multiple insurance companies. These are typically Enterprise Rent-A-Car employees working on site at an insurance company office or Rental Management Services employees who are also Enterprise employees who manage rentals for the insurance company but are not on site.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.9 Can user receive work ?

This flag indicates that user can receive work (e.g. requests for authorization, requests for extension etc.). Typically, a manager would set this flag to "No" so that work would not be assigned to him or her although he or she could be notified in certain situations like authority limit exceeded etc..

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.10 Is User Active ?

This flag indicates the user is currently active and may log on to the system to do work.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.11 Email Address

This is the email address of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 30
Data Source: <Data Source>

4.1.12 First Name

This is the first name of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 15
Data Source: <Data Source>

4.1.13 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password
Data Field Length: 10
Data Source: <Data Source>

4.1.14 User Id

This is the user id that the user will use to sign on to the ARMS Web System. This id must be unique across the whole system.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

5. Questions and Answers

Issue Number: 321

Question: When do we "Kill" profiles that have been created but not used?
Question 2 - Do we allow for deleting users, and if so, who would handle this function? Question 3 - Do we allow for deleting inactive user, and if so, who would handle this function?

Status: Closed - Resolved

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out?
08-07-00 - Brad Reel: UserIDs that were created, but never accessed will be made inactive after six months. UserIDs that have not been accessed for two years will also be made inactive. After being made inactive, they will be purged after three additional months.

Issue Number: 322

Question: Do we allow for deleting users, and if so who would it be that does so?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with Issue 321

Issue Number: 323

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Question:** When do we delete an inactive user? And who would handle?**Status:** Closed - Merged**Resolution:** 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with issue 321**Issue Number: 324**

Question: User ID: Do we have current Enterprise Business rules that we need to enforce, and if so, what are they? The assumption we made when discussing this was that the admin could give them whatever ID the user desired. If user wanted the ID Beavis, the admin could create it. The question is, are there some rules we want to enforce (i.e. User ID's start w/ first three characters of insurance company's name, GEI for GEICO) and some defaults for both UserID & Password? Maybe for GEICO, the first user is GEI0001 and the default password is GEICO. Just something we need to address.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - I think we should give them whatever user ID they want.

3-30-00. Kim DeVallance - user ID is a company specific item. For example, GEICO's is their associate ID (similar to our employee number). Progressive uses their PACMAN ID, Nationwide uses their RACF ID...all a similar concept. It is an ID that the adjuster is familiar with and I think we should allow the customer to use an employee number already familiar to the adjuster.

4-7-00, Issue Mtg, the field is 10 characters, First three will be company driven, the next 7 can be alpha/num and the users choice.

4-11-00, Brad Reel - Current State, ID's are first three characters of the company's name, and up to seven numeric characters. Could possibly expand to seven alpha-numeric instead of just numeric. Barring any disagreement, we will suggest the following in the ARMS Web system: first three characters of the company's name are the first three characters of the ID. Then the ID must include at least 4 alpha-numeric characters with at least one number in it. The minimum ID length would be 7 characters, the maximum 10. Suggest we try to force companies to use their employee IDs as the seven digits. ARMS Web system can generate a number if necessary.

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Issue: 1.2
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Need to confirm with our security people that this is acceptable security on an Enterprise-owned application. Also, should consider whether or not we think first three characters of a company's name will allow us to always uniquely identify companies.

Issue Number: 325

Question: Current State we capture the primary address for the user, (the address the user (adjuster) is located at) do we want to do the same in future state? In the screen prototype should the primary user (adjuster) address be capture in the user profile screens, given that we currently have an office address in the office profile?

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim-I do not think it is necessary for the ARMS/Web application, but it may be a mandatory field for the ARMS system when it processes info. I would recommend checking with the analysts from ARMS. We pull the address from ECARS when we send a paper bill, and if the bill is electronic, the address does not matter.

4-7-00, Issue Mtg, Default to office address, allow at the user level to be changed, if it is changed it will only update the database not the 400.

4-11-00, Brad Reel - When creating a user, we need to capture a user-specific address. It should default to the primary office they are assigned to when they are first created, but be changeable. This means we have to change the process for adding a user so we identify their primary office before we enter address information.

Issue Number: 326

Question: Can a user be maintained at more than one office? Do we still have a default/primary office when the user is created?

Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Status:** Closed - Resolved

Resolution: 3-22-00, Dave Smith - For tracking purposes, I think we need to maintain one profile only. If someone moves to another location because of a disaster, we should move the profile to that office. Perhaps to make it easy on the transition, we could transfer their base profile and let the new office modify accordingly.

3-27-00, Ask Brad to follow-up with Dave Smith.

3-30-00, Kim DeVallance - Current state, yes a user can be maintained at more than one office, but a user should have a primary office.

Issue Number: 327

Question: Do we need a primary office at which you see all work below you? This would apply only to people who were in offices that were not claims offices. Example: I am a regional VP (wouldn't that be cool) and I want to use the system. I define "Default One" as my region, so when I look at stuff in the system an I see all the offices under my office as my default.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement.
3-30-00, Kim DeVallance - This would be great!!!

Issue Number: 328

Question: Do we need a primary office that you can create work at? This would apply to everyone and defines the primary office I can create work in. For an Adjuster, this would be their primary office. For someone at a higher level, it would be the office they assign work to if they create it. Following the example above, if that VP creates a res (unlikely, but work with me), this default would be the claims office it would be sent to for completion.

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Status:** Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement as well.
3-30-00, Kim DeVallance - Yes, but keep in mind during the life of a rental we can transfer the rental to different offices within the same company profile.

Issue Number: 329

Question: Where does the manager get assigned to a user? At the Office Level, the User Level or the Team level? Can a user have more than one manager?

Status: Closed - Resolved

Resolution: 08-08-00 - Brad Reel: Upon further discussion with the business, the process for selecting a person to handle an authorization limit is as follows: When a user hits an authorization limit, the system will request that the user select another user to approve the request and handle the rental. The system will only present users that have limits higher than the requested amount/number of days. Once the user has been selected, the rental will then be permanently transferred to the chosen user.

Issue Number: 331

Question: Under Report Layout section, is this for the office to give the user what fields that they want them to see? Then the user can set how he views these fields in MY PROFILE?

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - It allows the user to create a default report layout as well as establish groupings. For example: I may want a team group which allows me to select adjusters to view. However, this would be a function which had to be approved in the profile of the user. Otherwise they can

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only see their work.

Issue Number: 332

Question: Are the authorization limits for the life of the rental or the transaction, (as applied to use by an adjuster)

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - Both - There is a daily limit and a rental max.
For the life of the rental.

Issue Number: 350

Question: Do we want to force a search before and admin can add a user?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: When adding a user, the system will search for the UserID and ensure it does not exist. No other searches will be performed.

Issue Number: 352

Question: Where does the ability to change the language the user can view the screens in reside? With the Admin or the user?

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Issue: 1.2
Issue Date: 10/20/00**Status:** Deferred**Resolution:****Issue Number:** 356**Question:** When setting up a user, should the office profile restrict the user's profile? Or are the office and user profiles independant of each other?**Status:** Closed - Resolved**Resolution:** 08-07-00 - Brad Reel: Office profile overrides user profile. A user can have more rights than the office, but will still be restricted to only activities that can be performed in that office based on the office profile while they are working in that office.**Issue Number:** 360**Question:** Brad Decoder, Password/ do we send e-mail to the admin to let them know how many times login failed?**Status:** I2 User Review**Resolution:****Issue Number:** 365

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Question:** Do we need a batch process for adding users?**Status:** Closed - Resolved

Resolution: 07-03-00 - Brad Reel: This question has also been asked in the more general setting of "Should a process exist for walking a user through setting up an entire company (much like a wizard tool)." For this release of ARMS Web (V2.0) a batch process for creating users will not be created. There will also not be a wizard for creating a company. However, for future releases, this wizard will be a very worthwhile tool to create and should be incorporated into future releases.

Enterprise Rent-A-Car

Functional Design Specification Maintain User

Version 1.3

Last Saved: 8/18/00 1:02 PM

Maintain User

Issue: 1.2

Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
3/29/00	1.0	Subdocuments merged into master document	Brad Reel, Anil Kabra, Russ Dittmar, Deborah Ealick, Johnny Sands, Gary Thomae, Cindy Bastean
4/4/00	0.2	Revisions after cross team review and inter-team final review	Brad Reel, Deborah Ealick, Cindy Bastean
July 5, 2000	1.0	Re-write to update based on iteration one feedback	Brad Reel
September 15, 2000	1.2	Modified to reflect resolved issues	Brian Weingart
September 25, 2000	1.3	Updated screens and specs	Brian Weingart

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Maintain User

1. Maintain User Use Case

1.1 Brief Description

The Maintain User use case describes how a USER would set up or maintain a user in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR is a person who can perform this use case to set up any user in a company.
- **COMPANY ADMINISTRATOR** – *The COMPANY ADMINISTRATOR is a person who can perform this use case for the company. They may add users and assign them to office(s) that they are the administrator of within the company.*
- **OFFICE ADMINISTRATOR** – The OFFICE ADMINISTRATOR is a person who can perform this use case for the company. The OFFICE ADMINISTRATOR may maintain any user in their company structure to which they have been assigned ownership.

1.3 Pre-Conditions

- The USER must be logged into the system.
- If maintaining a user, the USER should have the ability to maintain that user. In order to maintain a user at a specific office, the ADMINISTRATOR must have access to that specific office.
- If adding a user, the USER should have the ability to add a user.

1.4 Flow of Events

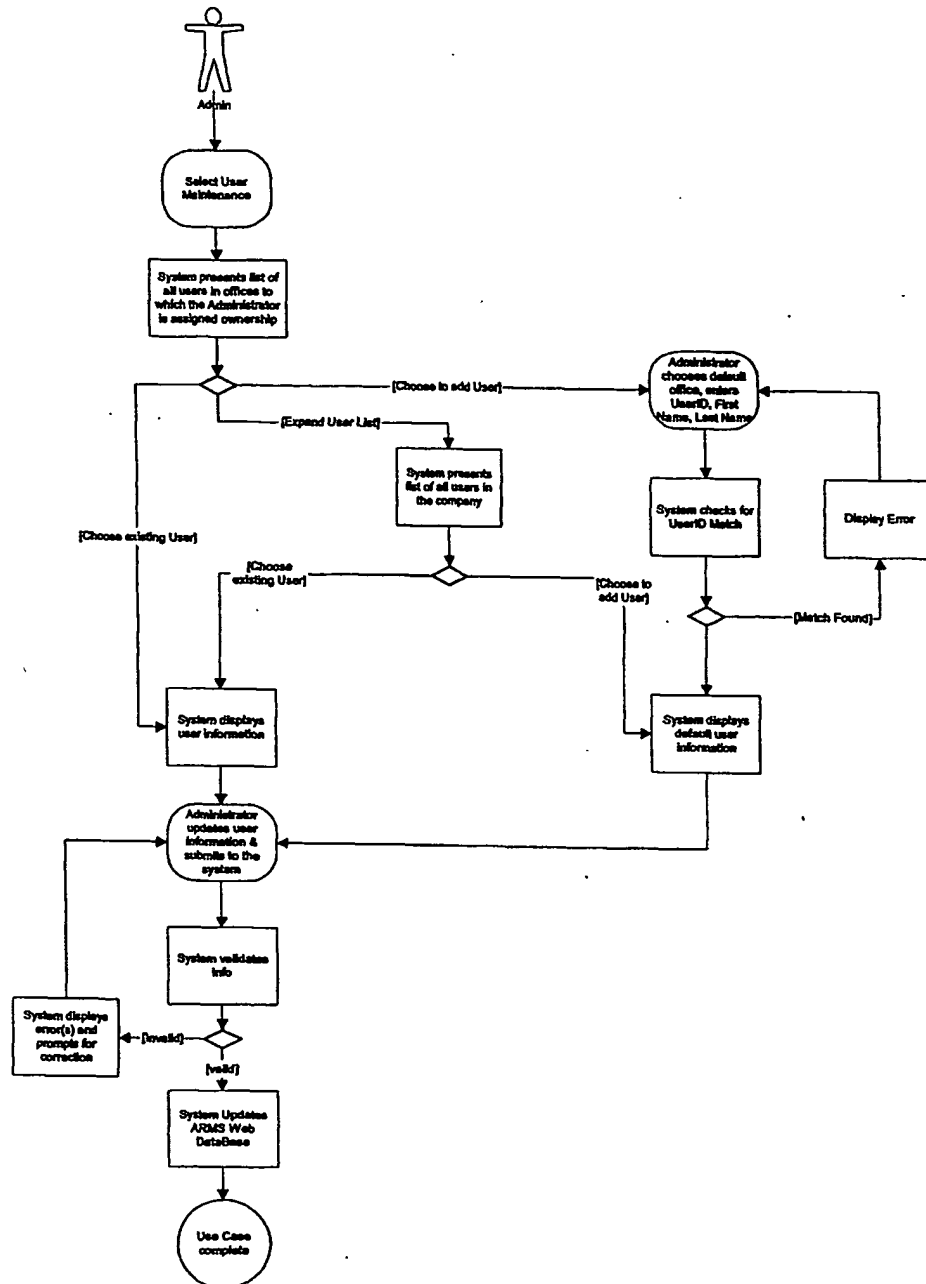
The Flow of Events will include all the steps necessary to add or maintain a company user in the ARMS Web system.

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1.4.1 Activity Diagram

Maintain User Activity Diagram



9/14/00

Y:\APPS\ARMSWebApplication\dkb\ARMS Web\Release One\PR-Profiling\PR-05-Maintain User\ACTIVITY DIAGRAMS\PR-05 MAINTAIN USER.VSD

1.4.2 Basic Flow

The Basic Flow will describe how a USER will maintain a user in the ARMS Web system.

1. The USER will choose to maintain user(s).
2. The system will present a list of all users that are in all the offices the USER has access to maintain.
3. The USER will choose a user to maintain.
4. The system will display the user's information for the USER to edit.
5. The USER will update the user's information and submit the information to the system.
6. The system will validate the information entered.
7. The system will update the ARMS Web database.
8. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Add User

At step three in the Basic Flow, the USER may choose to add a user, if they have the authority level to do so. The USER will enter a primary office, UserID, First Name and Last Name for the new user. The system will then validate that the office was entered and the UserID does not exist. If a UserID match is found, or the office was not entered, the system will display an error and request the USER enter a new UserID. Otherwise, the system will display the default settings for a new user; the USER will update the default settings and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

1.4.3.2 Show All Users for the Company

At step three in the Basic Flow, the USER may choose to display all users within the company. This would allow for adding users to offices the USER controls. The USER will choose the user they wish to work with and the system will then display the user's information; the USER will add the user to any offices the USER controls and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

- 1.4.3.2.1 If a user's primary office is not an office controlled by the USER, the USER may only add the user to offices the USER controls. The USER should not be able to change any of the user's settings. A USER that has control of a user's primary office can only change user settings.

1.4.3.3 User Information Validation Fails

In step six of the Basic Flow, the system may find that user information entered by the USER does not meet the validation criteria. The system should return the USER to step four of the Basic Flow, show the USER the invalid data, and prompt the USER to reenter the data.

This rule also applies for new user creation. Whenever a new user is submitted to the system for creation, the system must validate that the criteria entered is valid. If any information is invalid, the system should present the invalid data to the USER, and prompt the user to correct it.

- 1.4.3.3.1 The following fields must be populated to complete a user update or new user creation.

- Last Name
- First Name
- UserID (Must be validated to ensure it is not a duplicate ID)
- Home Office (Must be a valid office and not null)

1.4.3.4 Cancel Add / Maintain User

Until step five in the Basic Flow, the USER may choose to cancel the use case. The system

should not store any changes made by the USER within the use case.

1.5 Post-Conditions

- If the use case was successful and the USER was maintaining a user, the user criteria being changed will have been changed and updated in the ARMS Web system.
- If the use case was successful and the USER was adding a user, the user will have been added in the ARMS Web system.
- If the use case was unsuccessful, the system state will be unchanged.

1.6 Special Requirements

1.6.1 User Inactivation

In order to inactivate a user, the following set of criteria must be validated. If any of the criteria are found to be true, then the system will not allow the USER to inactivate the user.

- If A4XREFL1/X4STCD is equal to 'C' (closed rental) and any tickets were closed in the past seven days
- If A4XREFL1/X4STCD is equal to 'A' (audited invoice)
- If A4XREFL1/X4STCD is equal to 'R' (reservation)
- If A4XREFL1/X4STCD is equal to 'O' (open contract)
- If A4XREFL1/X4STCD is equal to 'U' (unconfirmed) and A4XREFL1/X4RSFG is equal to 'D' (Direct Bill request)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'C' (extension request & message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'M' (authorization message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'X' (extension request sent)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'B' (invoice sent from ARMS)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'R' (invoice returned to adjuster)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'E' (rejected system error)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'Q' (rejected invoice ARMS researching)

1.6.2 User Default Settings

Whenever a new user is created, the settings for that user should be defaulted based on the user's primary office profile settings. For example, if the office is a reservation only office, the user should default to reservation only. This does not imply that the administrator cannot change the settings. This should also apply to whether can receive work setting should be on or off for the user/team. If all other users/teams in the office have the setting either on or off, then the new user should mimic this setting. Once again, this does not imply that the administrator cannot change this setting.

1.7 Extension Points

None.

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Create or Modify User

This screen will allow the USER to search for and select a user to modify or select to add a new user.

2.1.1 Screen Layout

2.1.2 Create or Modify User

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
User ID:	Input	10	User Id	ARMS Profile ID	
First Name:	Input	15	First Name of New User	First Name	
Handling For	Output	30	Handling For	First Name + Last Name	
Last Name:	Text Box	20	Last Name of New User	Last Name	

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Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User ID	Output	10	List of User Ids within the company	Adjustor Code	
Name	Output	30	List of Users within a Company	First Name + Last Name	
User ID:	Input	10	User Id	Adjustor Code	
Primary office	List Box	25	Primary office	external organization name	
Primary office	Output	10	List of Primary offices	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions within Company	external organization name	
Office:	Output	4	Office Id	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.1.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.1.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new user (Office, Last Name, First Name UserID). If the information is entered, the system will create a new user with those attributes and the other user attributes defaulted. The system should then display the new user's profile.

Maintain User

Issue: 1.2
Issue Date: 10/20/00**2.2 Create or Modify Team**

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.2.1 Screen Layout
2.2.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User		
Name	Output	20	Adjusters Associated with the Company	First Name + Last Name	
Handling For	Output	20	Handling For	First Name + Last Name	
User ID	Output	7	List of User Ids Associated with a Company	Adjustor Code	
Primary office	List Box	20	Primary office associated with Team	external organization abbreviated name	
Primary office	Output	10	List of Primary offices Associated with a Company	external organization abbreviated name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Office Description	Output	20	List of Office Descriptions associated with a comp	external organization name	
Office	Output	10	Office	external organization abbreviated name	
Team Name	Input	15	Team Name	external organization name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 A – Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.2.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.2.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new team (Office, Team Name). If the information is entered, the system will create a new team with those attributes and the other user attributes defaulted. The system should then display the new team's profile.

Maintain User

Issue: 1.2
Issue Date: 10/20/00


2.3 User Profil

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.3.1 Screen Layout

Maintain User

Issue: 1.2
Issue Date: 10/20/00

 Welcome to the
Automated Rental Management System

[Create a Reservation](#) [Find a Customer](#)

Claims Office: 001 Handling for: Yourself

Administration:
MODIFY USER

User Information:

Office:

001
002
003
004
005

Selected Office

Authorizations:

Work Authority:

☐ Top of page

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2.3.2 User Profile

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reset Password	Check Box	1	Reset Password Indicator		

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Email Address:	Text Box	15	Adjuster's Email Address	e-Mail address	
First Name	Text Box	15	First Name	First Name	
Handling For	Output	10	Handling For	First Name + Last Name	
Last Name	Text Box	10	Last Name	Last Name	
User ID:	Output	0	User Id	Adjustor Code	
Active	Check Box	1	User is Active	Status:Active/Inactive	
Address	Output	25	Home Office Address	Customer Address Line 1+ Customer Address Line 2	
Phone:	Output	10	Home Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Home Office Postal Code	Zip Code	
City	Output	15	Home Office City	customer city text	
ST/PROV	Output	5	Home Office State	customer state code	
Office	Output	10	Office	external organization abbreviated name	
Home Office	List Box	20	Office Name	external organization name	
Other authorized Offices	List Box	20	Other authorized Offices for The User	external organization name	
Allow files and action items to be assigned to this user	Check Box	1	Allow files & action items to be assigned to user	profile type value code	If Allow Files and Action Items have been selected, this user or team will appear in the Handle For list.
Authorize/Extend Rental	Check Box	1	Allow user to Authorize/Extend Rental	profile type value code	
User Maintenance	Check Box	1	Allow user to conduct user maintenance	profile type value code	
Create Reservation	Check Box	1	Allow user to create reservation	profile type value code	
Reporting (Management)	Check Box	1	Allow user to do reporting	profile type value code	
Pay Invoice	Check Box	1	Allow user to Pay Invoices	profile type value code	
Days/Rental	Text Box	10	Authorization Limit on Days per Rental	profile type value quantity	
\$ ____ max/rental	Text Box	10	Authorization Limit on Maximum Dollars per Rental	profile type value amount	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.3.3.1.1 The user must have a First Name, Last Name and Home Office entered. The Home Office must be a valid office for that company.

2.3.3.1.2 Work Authority for each user will default to all enabled.

2.3.3.1.3 If the Active switch has been set to inactive, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the user to be set to inactive. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to inactivate the user.

2.3.3.1.4 If the reset password option is set, the system will reset the user's password. This will reset the user's password to the password used for new users. Need to verify what that password is.

2.3.3.1.5 If the File Ownership flag is turned off, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to turn off file ownership.

Maintain User

Issue: 1.2
Issue Date: 10/20/00

2.4 Team Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.4.1 Screen Layout

Welcome to the
Automated Rental Management System

create a RESERVATION find a CUSTOMER

Claims Office: 001 Handling for: Y

Administration:
MODIFY TEAM

Team Information:

Office:

Team Members:

- Frank Pizzo
- Phil Connors
- Ned Fyerson
- Regis Philbin
- Rex Kramer
- Jeff Everson
- Doris Pickarill
- David Forester
- Odeus Urugus
- Florus Maximus
- Johnny B. Good
- Captain Covenan

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Maintain User

Issue: 1.2
Issue Date: 10/20/00

2.4 Team Profil

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.4.1 Screen Layout

Enterprise Rent-A-Car
Welcome to the
Automated Rental Management System

Create a RESERVATION Find a CUSTOMER

Claims Office: 001 Handling for: [REDACTED]

Administration:
MODIFY TEAM

Team Information:

[REDACTED]

Office:

[REDACTED]

Team Members:

Frank Pizzo	
Phil Connors	
Ned Ryerson	
Rogis Philbin	
Rex Kramer	
Jeff Everson	
Doris Pickarill	
David Fereday	
Odenus Unangus	
Flores Maxinus	
Johnny B. Good	
Captain Caveman	

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2.4.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Allow files and action items to be assigned to this team	Check Box	1	Allow action items to be assigned to team		
Available	List Box	30	Available Members for Team	First Name + Last Name	
E-mail Address	Text Box	20	Email Address	e-Mail address	
Handling For:	Output	20	Handling For:	First Name + Last Name	
Active	Check Box	1	Team Active Indicator	Status:Active/Inactive	
Team Members	List Box	30	Team Members	First Name + Last Name	
Phone Number	Output	10	Branch Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Branch Office Postal Code	Zip Code	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
ST/PROV	Output	3	Branch Office State or Province	customer state code	
City	Output	15	Home Office City	customer city text	
Home Office	Output	20	Home Office Name	external organization name	
Office	Output	5	Office	external organization abbreviated name	
Team Name	Text Box	20	Team Name	external organization name	

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.4.3.1.1 The team must have a Team Name and Home Office entered. The Home Office must be a valid office for that company.

2.4.3.1.2 If the Active switch has been set to inactive, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the team to be set to inactive. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to inactivate the team.

2.4.3.1.3 If the File Ownership flag is turned off, the system will check to see if the team

owns any open work. If the team owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to turn off file ownership. If the user or team does not receive File Ownership, that user or team will not display in the Handle For list.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Build list of Users

(Office Id, First Name, Last Name, User ID)

Build a list of User first and last names NOT limited to a given office in order to search for a user. Limited by the first or last name passed.

3.2 Find User Information

(User Id)

Retrieve the current values for a user's profile.

3.3 Update User Information

(User Id, Name, e-mail Address, Out of Office, Handler for out of office user, Initial Page, Is user Multi-company, Is User Active, Current Password, New Password, Receive Authorization Assignment)

Update the given data values for the user profile.

3.4 Build list of User offices

(User Id)

Build a list of office names for the offices the user is assigned to.

3.5 Find User Office Information

(User Id, Office Id)

Retrieve the current values assigned for the user at a given office.

3.6 Update User Office Information

(User Id, Office Id, and data values)

Update the given data values for the user profile.

3.7 Add User Office Information

(User Id, Office Id)

Assign user access to another office. Default values are set for the users access.

3.8 Remove User Office Information

(User Id, Office Id)

Revoke assignment of the user to an office. The user cannot be revoked from their primary office

3.9 Build a list of users to which the administrator has access

(Company ID, Administrator ID, User ID)

Build a list of User first and last names limited to a given office in order to maintain a user. Limited by the first or last name passed.

3.10 Validate that User ID does not exist

(User ID)

Verify that the administrator must add a new user.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 User Language Preference

This is the user's language preference while working with the ARMS Web System.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.2 Phone Number

This is the user's phone number.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

4.1.3 Profile Attribute Id

I.S. assigned identifier for a profile attribute. Must be unique and non-blank. Each profilable item will have a profile attribute.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.4 Last Name

This is the last name of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 20
Data Source: <Data Source>

4.1.5 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric
Data Field Length: 0
Data Source: <Data Source>

4.1.6 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL
Data Field Length: 256
Data Source: <Data Source>

4.1.7 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.8 Is the user multicompany ?

This flag indicates that this user can do work for multiple insurance companies. These are typically Enterprise Rent-A-Car employees working on site at an insurance company office or Rental Management Services employees who are also Enterprise employees who manage rentals for the insurance company but are not on site.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.9 Can user receive work ?

This flag indicates that user can receive work (e.g. requests for authorization, requests for extension etc.). Typically, a manager would set this flag to "No" so that work would not be assigned to him or her although he or she could be notified in certain situations like authority limit exceeded etc..

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.10 Is User Active ?

This flag indicates the user is currently active and may log on to the system to do work.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.11 Email Address

This is the email address of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 30
Data Source: <Data Source>

4.1.12 First Name

This is the first name of the user.

Data Field Type: Alpha-Numeric
Data Field Length: 15
Data Source: <Data Source>

4.1.13 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password
Data Field Length: 10
Data Source: <Data Source>

4.1.14 User Id

This is the user id that the user will use to sign on to the ARMS Web System. This id must be unique across the whole system.

Data Field Type: Alpha-Numeric
Data Field Length: 10
Data Source: <Data Source>

5. Questions and Answers

Issue Number: 321

Question: When do we "Kill" profiles that have been created but not used?
Question 2 - Do we allow for deleting users, and if so, who would handle this function? Question 3 - Do we allow for deleting inactive user, and if so, who would handle this function?

Status: Closed - Resolved

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out?
08-07-00 - Brad Reel: UserIDs that were created, but never accessed will be made inactive after six months. UserIDs that have not been accessed for two years will also be made inactive. After being made inactive, they will be purged after three additional months.

Issue Number: 322

Question: Do we allow for deleting users, and if so who would it be that does so?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with Issue 321

Issue Number: 323

Question: When do we delete an inactive user? And who would handle?

Status: Closed - Merged

Resolution: 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with issue 321

Issue Number: 324

Question: User ID: Do we have current Enterprise Business rules that we need to enforce, and if so, what are they? The assumption we made when discussing this was that the admin could give them whatever ID the user desired. If user wanted the ID Beavis, the admin could create it. The question is, are there some rules we want to enforce (i.e. User ID's start w/ first three characters of insurance company's name, GEI for GEICO) and some defaults for both UserID & Password? Maybe for GEICO, the first user is GEI0001 and the default password is GEICO. Just something we need to address.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - I think we should give them whatever user ID they want.

3-30-00, Kim DeVallance - user ID is a company specific item. For example, GEICO's is their associate ID (similar to our employee number). Progressive uses their PACMAN ID, Nationwide uses their RACF ID...all a similar concept. It is an ID that the adjuster is familiar with and I think we should allow the customer to use an employee number already familiar to the adjuster.

4-7-00, Issue Mtg, the field is 10 characters, First three will be company driven, the next 7 can be alpha/num and the users choice.

4-11-00, Brad Reel - Current State, ID's are first three characters of the company's name, and up to seven numeric characters. Could possibly expand to seven alpha-numeric instead of just numeric. Barring any disagreement, we will suggest the following in the ARMS Web system: first three characters of the company's name are the first three characters of the ID. Then the ID must include at least 4 alpha-numeric characters with at least one number in it. The minimum ID length would be 7 characters, the maximum 10. Suggest we try to force companies to use their employee IDs as the seven digits. ARMS Web system can generate a number if necessary.

Maintain User

Issue: 1.2
Issue Date: 10/20/00

Need to confirm with our security people that this is acceptable security on an Enterprise-owned application. Also, should consider whether or not we think first three characters of a company's name will allow us to always uniquely identify companies.

Issue Number: 325

Question: Current State we capture the primary address for the user, (the address the user (adjuster) is located at) do we want to do the same in future state? In the screen prototype should the primary user (adjuster) address be capture in the user profile screens, given that we currently have an office address in the office profile?

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim-I do not think it is necessary for the ARMS/Web application, but it may be a mandatory field for the ARMS system when it processes info. I would recommend checking with the analysts from ARMS. We pull the address from ECARS when we send a paper bill, and if the bill is electronic, the address does not matter.

4-7-00, Issue Mtg, Default to office address, allow at the user level to be changed, if it is changed it will only update the database not the 400.

4-11-00, Brad Reel - When creating a user, we need to capture a user-specific address. It should default to the primary office they are assigned to when they are first created, but be changeable. This means we have to change the process for adding a user so we identify their primary office before we enter address information.

Issue Number: 326

Question: Can a user be maintained at more than one office? Do we still have a default/primary office when the user is created?

Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - For tracking purposes, I think we need to maintain one profile only. If someone moves to another location because of a disaster, we should move the profile to that office. Perhaps to make it easy on the transition, we could transfer their base profile and let the new office modify accordingly.

3-27-00, Ask Brad to follow-up with Dave Smith.

3-30-00, Kim DeVallance - Current state, yes a user can be maintained at more than one office, but a user should have a primary office.

Issue Number: 327

Question: Do we need a primary office at which you see all work below you? This would apply only to people who were in offices that were not claims offices. Example: I am a regional VP (wouldn't that be cool) and I want to use the system. I define "Default One" as my region, so when I look at stuff in the system an I see all the offices under my office as my default.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement.
3-30-00, Kim DeVallance - This would be great!!!

Issue Number: 328

Question: Do we need a primary office that you can create work at? This would apply to everyone and defines the primary office I can create work in. For an Adjuster, this would be their primary office. For someone at a higher level, it would be the office they assign work to if they create it. Following the example above, if that VP creates a res (unlikely, but work with me), this default would be the claims office it would be sent to for completion.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement as well.
3-30-00, Kim DeVallance - Yes, but keep in mind during the life of a rental we can transfer the rental to different offices within the same company profile.

Issue Number: 329

Question: Where does the manager get assigned to a user? At the Office Level, the User Level or the Team level? Can a user have more than one manager?

Status: Closed - Resolved

Resolution: 08-08-00 - Brad Reel: Upon further discussion with the business, the process for selecting a person to handle an authorization limit is as follows: When a user hits an authorization limit, the system will request that the user select another user to approve the request and handle the rental. The system will only present users that have limits higher than the requested amount/number of days. Once the user has been selected, the rental will then be permanently transferred to the chosen user.

Issue Number: 331

Question: Under Report Layout section, is this for the office to give the user what fields that they want them to see? Then the user can set how he views these fields in MY PROFILE?

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - It allows the user to create a default report layout as well as establish groupings. For example: I may want a team group which allows me to select adjusters to view. However, this would be a function which had to be approved in the profile of the user. Otherwise they can

Maintain User

Issue: 1.2
Issue Date: 10/20/00

only see their work.

Issue Number: 332

Question: Are the authorization limits for the life of the rental or the transaction, (as applied to use by an adjuster)

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - Both - There is a daily limit and a rental max.
For the life of the rental.

Issue Number: 350

Question: Do we want to force a search before and admin can add a user?

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: When adding a user, the system will search for the UserID and ensure it does not exist. No other searches will be performed.

Issue Number: 352

Question: Where does the ability to change the language the user can view the screens in reside? With the Admin or the user?

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Status:** Deferred**Resolution:****Issue Number:** 356**Question:** When setting up a user, should the office profile restrict the user's profile? Or are the office and user profiles independent of each other?**Status:** Closed - Resolved**Resolution:** 08-07-00 - Brad Reel: Office profile overrides user profile. A user can have more rights than the office, but will still be restricted to only activities that can be performed in that office based on the office profile while they are working in that office.**Issue Number:** 360**Question:** Brad Decoder, Password/ do we send e-mail to the admin to let them know how many times login failed?**Status:** I2 User Review**Resolution:****Issue Number:** 365

Maintain User

Issue: 1.2
Issue Date: 10/20/00**Question:** Do we need a batch process for adding users?**Status:** Closed - Resolved

Resolution: 07-03-00. - Brad Reel: This question has also been asked in the more general setting of "Should a process exist for walking a user through setting up an entire company (much like a wizard tool)." For this release of ARMS Web (V2.0) a batch process for creating users will not be created. There will also not be a wizard for creating a company. However, for future releases, this wizard will be a very worthwhile tool to create and should be incorporated into future releases.

Enterprise Rent-A-Car

Functional Design Specification User Profile

Version 1.0

Last Saved: 8/18/00 9:53 AM

ARMS Redesign Project - Release 1.0
User Profile

Issue: 1.0
Issue Date: 10/20/00

Revision History

Date	Issue	Description	Author
3/29/00	1.0	Combined subdocuments with master document. Gathered data directly from databases.	Brad Reel, Anil Kabra, Russ Dittmar, Johnny Sands, Gary Thomae, Deborah Ealick, Cindy Bastean
4/5/00	0.2	Revised per cross-team and intra-team final evaluations	Cindy Bastean, Deborah Ealick, Brad Reel
July 6, 2000	1.0	Revised to reflect iteration one review and other items discovered during development.	Brad Reel
August 18, 2000	1.0	Updated all issues.	Brad Reel

ARMS Redesign Project - Release 1.0

Issue: 1.0

User Profile

Issue Date: 10/20/00

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1. User Profile Use Case

1.1 Brief Description

The User Profile use case describes how the USER would customize their working environment. User Profile will allow the USER to change their password, set his or her out of office, and modify their Favorite Locations list.

1.2 Use Case Actors

Actors will use this use case to update their user profile. The following actors will interact with this use case:

- **ENTERPRISE ADMINISTRATOR**
- **COMPANY ADMINISTRATOR**
- **OFFICE ADMINISTRATOR**
- **CLAIMS MANAGER**
- **ADJUSTER**
- **FIRST NOTICE OF LOSS ADJUSTER**
- **PROCESSOR**

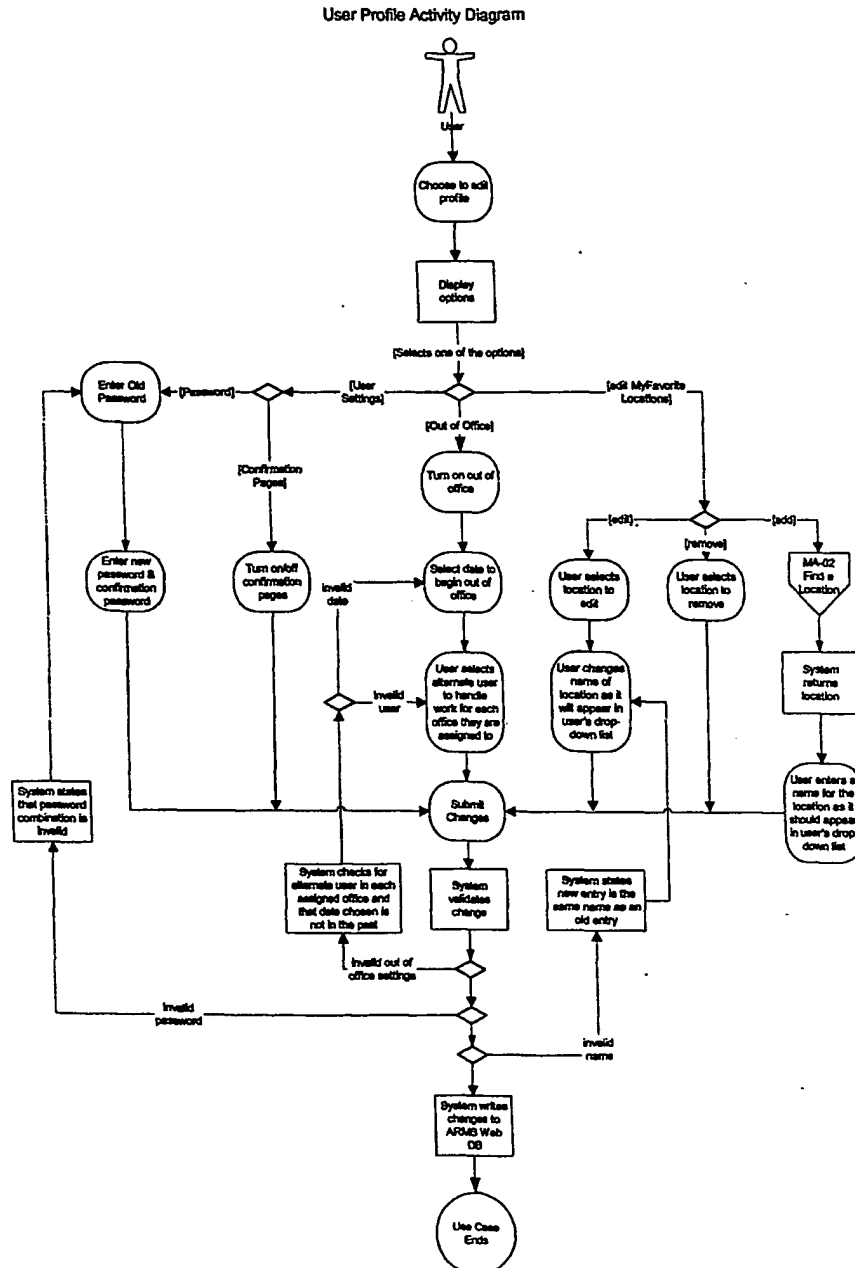
1.3 Pre-Conditions

- The company must be enrolled in ARMS Web.
- The USER must be enrolled and have an active User ID and password.
- The USER must be logged into the ARMS Web system.

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to "My Profile"

1.4.1 Activity Diagram



\\FSCORP00\CORP_PUBLIC\APPS\ARMSWebApplication\@db\ARMS Web\Release One\PR-
Profiling\PR-07-User Profile\ACTIVITY DIAGRAMS\PR-07 MY PROFILE.VSD

8/4/00

1.4.2 Basic Flow

1. The USER will choose to edit their User Profile.
2. The system will display the USER'S User Profile
3. The USER will specify the action they would like to perform (user settings, set out of office, add a Favorite Location, remove a Favorite Location, edit a Favorite Location).
4. The USER will select one of the options.
5. Based on the USER'S response, one or more of the following subflows is executed:
 - If the USER chooses to edit a Favorite Location, the Edit Favorite Location Subflow is executed.
 - If the USER chooses to add a Favorite Location, the Add Favorite Location Subflow is executed.
 - If the USER chooses to remove a Favorite Location, the Remove Favorite Location Subflow is executed.
 - If the USER chooses to set the Out of Office Function, the Out of Office Subflow is executed.
 - If the USER chooses to Change Password, the Change Password Subflow is executed.
 - If the USER chooses Confirmation Page, the Confirmation Page Subflow is executed.

1.4.2.1 Edit Favorite Location Subflow

This subflow allows the USER to edit a location on their Favorite Locations List.

1. The USER selects the location they wish to edit from their Favorite Locations List.
2. The USER changes the name they wish to use to identify the location. This is the name that will be displayed to them in their Favorite Locations List.
3. The USER submits the information to the system.
4. The system updates ARMSWeb to reflect the new Favorite Location.
5. The use case ends.

1.4.2.2 Add Favorite Location Subflow

This subflow allows the USER to add a location to the Favorite Locations List.

1. The USER will execute Functional Specification MA-02: Find a Rental Location to search for the location they would like to add to their Favorite Locations List.
2. The USER selects the location they wish to add to their Favorite Locations List.
3. The USER enters the name they wish to use to identify the location. This is the name that will be displayed to them in their Favorite Locations List.
4. The USER submits the information to the system.
5. The system updates ARMSWeb to reflect the new Favorite Location.
6. The use case ends.

1.4.2.3 Remove Favorite Location Subflow

This subflow allows the USER to remove a location from their Favorite Locations List.

1. The USER selects the location they wish to remove from their Favorite Locations List.
2. The USER submits the information to the system.
3. The system updates ARMSWeb to reflect the removal of the Favorite Location.
4. The use case ends.

1.4.2.4 Out Of Office Subflow

This subflow allows the USER to select when they are out of office and assigns their workload to another USER.

1. The USER will set choose to be Out of Office
2. The USER will enter the beginning date of when they will be Out of Office.

ARMS Redesign Project - Release 1.0

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User Profile

Issue Date: 10/20/00

3. The USER will choose an alternate USER to handle their work for each office the USER is assigned to.
4. The USER submits the information to the system.
5. The system validates the changes.
6. The system updates ARMSWeb database to reflect the out of office status. At this time, the system will assign any work that exists for the USER to the chosen user(s). Any new work that is assigned to the USER will automatically be reassigned by the system to the chosen user(s).
7. The use case ends.

1.4.2.5 Change Password Subflow

This subflow allows the USER to change their current password.

1. The USER enters the old password.
2. The USER enters the new password of their choice.
3. The USER re-enters new password for verification.
4. The USER submits the passwords to the system.
5. The system validates the password changes.
6. The system updates ARMSWeb to reflect the new password changes.
7. The use case ends.

1.4.2.6 Confirmation Page

This subflow allows the USER to turn on or off confirmation pages in the ARMS Web system.

8. If Confirmation pages have been turned off, the user will turn them on.
9. If Confirmation pages have been turned on, the user will turn them off.
10. The USER submits the change to the system.
11. The system updates ARMSWeb to reflect the change.
12. The use case ends.

1.4.3 Alternative Flows

1.4.3.1 Invalid Password

At step five in the Change Password Subflow, if the current password is incorrect or if the confirmed password does not match the new password, the system will prompt the USER to re-enter the old, the new and the confirmation password.

~~It will be considered invalid if the new password entered was one of the USER'S last five ARMSWeb passwords.~~

~~It will be considered invalid if the new password is not at between six and 10 characters and alphanumeric in type. Validate in 3.1.1 & 1.4.3.1.2 in Sign-on.~~

1.4.3.2 Alternate Users not Chosen in Each Office USER is Assigned

At step five in the Out of Office Subflow, the system will validate that a user was selected to handle the USER'S work in each office the USER is assigned to. If a user was not chosen for each office, the system will notify the USER that they must select a user to handle their work in each office they are assigned to. The system will then return the USER to step two of the Out of Office Subflow.

1.4.3.3 Out of Office Start Date is in the Past

At step five in the Out of Office Subflow, the system will validate that a user selected an out of office date that is present (today) or in the future. If the date is in the past, the system will generate an error and ask the USER to enter a date that is either today or in the future. The system will then return the USER to step two of the Out of Office Subflow.

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Issue: 1.0

User Profile

Issue Date: 10/20/00

1.4.3.4 Favorite Location Name Entered is the same as an Existing Location

When the USER submits the name for a new location, or changes the name of an existing location, the system will validate that the name entered is not an exact duplicate of any other name in that USER'S list of Favorite Locations. If the name is a duplicate, the system will prompt the USER to enter a different name for the location in question. The system will then return the USER to step one of the Edit Favorite Location Subflow.

1.4.3.5 Cancel User Profile

At any point during the use case up until a change has been submitted to the system, the USER may decide to not update their profile.

1.5 Post-Conditions

- If the use case was successful then either a new password has been assigned, the out of office function will be turned on, or the USER'S Favorite Locations will be edited.
- If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

None.

1.7 Extension Points

None.

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User Profile

Issue Date: 10/20/00

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 My Profile

This screen will allow the USER to pick which functions that they wish to change.

2.1.1 Screen Layout – My Profile



Administration: My Profile

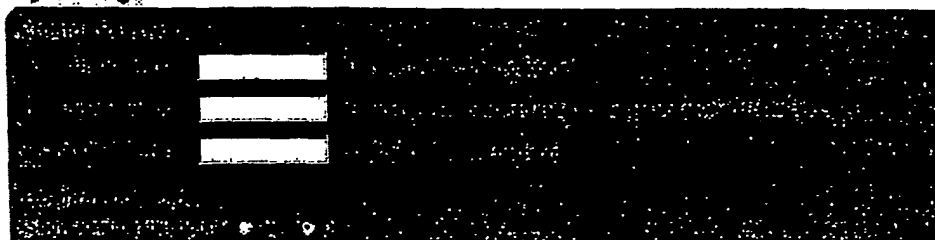
Add/Edit My Favorites List



Out of Office:



My Settings:

[Consult the Terms and Conditions](#)

ARMS Redesign Project - Release 1.0
User Profile

Issue: 1.0
Issue Date: 10/20/00

2.1.2 My Profile

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Remove This Branch	Check Box	1	Delete branch from preferred locations indicator		
First Day Out:	List Box	10	Out of office start date		Three drop downs: month, day, year
Off	Radio Button	1	Select feature setting		
On	Radio Button	1	Select feature setting		
Off	Radio Button	1	Show confirmation page		
On	Radio Button	1	Show confirmation page?		
Confirm Password:	Text Box	0	Password	change password	N/A.
New Password:	Text Box	0	Password	change password	N/A.
Adjuster:	List Box	30	Handler for out of office user	First Name + Last Name	
Handling For	Output	15	Handling For Adjuster	First Name + Last Name	
Old Password:	Text Box	0	Password	User Paswd	N/A.
Address	Output	30	Preferred Location Address	Address Line + AddressLine2	
Office	Output	10	Claims Office	external organization abbreviated name	
Office:	Output	10	Handler for out of office adjuster's office	external organization abbreviated name	
Name	Input	30	Preferred Location Name	location name	Defaults to address name

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Process

When clicked, the system will validate the information on the screen is correct and complete. If an error is found the screen will be redisplayed with a message indicating the error condition and highlighting the field in error. If no errors are found, the database will be updated with the new information.

2.1.3.2 Add A Different Office

When clicked, the system will take the USER to MA-02-Find Rental Location Use Case. Here, the USER will select a new location to add to the preferred location list, and then return to the PR-07-User Profile Use Case. The new information will be validated and the database will be updated.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Retrieve User Profile

(User Id)

Retrieve user's current profile settings.

3.2 Update User Profile

(User Id, Out of Office, Assigned Adjuster, Start Page)

Update user's Out of Office status, Adjuster to handle work during out of office period, and the user's initial page.

3.3 Change Password

(Current Password, New Password, New Password Confirmation)

Change the user's password from the current password to the new password. Validate that the current password is correct.

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Handler for out of office user

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric
Data Field Length: 0
Data Source: <Data Source>

4.1.2 Start Page

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL
Data Field Length: 256
Data Source: <Data Source>

4.1.3 Is user out of office ?

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

4.1.4 Password

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password
Data Field Length: 10
Data Source: <Data Source>

5. Questions and Answers

Issue Number: 334

Question: Is out of office assigned at the user level or at the office level? (Could you set this for each office you work out of?) Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtg, Defer to user review I2

08-07-00 - Brad Reel: A user will be required to set their out of office function for all offices they are assigned to in order to activate the function. The function is set up using the assumption that a user would only be out of office if they were unreachable at all offices (vacation, training, etc.). Since the system can be accessed from any web connection, it is possible for a user to do work for any and all offices they are assigned to from anywhere. Therefore, it seems logical that a user would only set their out of office function if they were not available in any capacity.

Issue Number: 335

Question: Does a user have the field level control of the fields he can see?

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtg, Should be set at the Office level, the user should not be able to set the field that they want to see.

4-11-00, Brad Reel - User does not need to have control over the fields they see. Control at the office (or team level, where applicable) is sufficient

Issue Number: 336

Question: Are we still using the "Requests to be Processed" page. (the Command Center) as an option for a start up page?

ARMS Redesign Project - Release 1.0
User Profile

Issue: 1.0
Issue Date: 10/20/00

Status: Future

Resolution: 4-7-00, Issue Mtg, Defer to future release, We are not sure that it will not be an option, right now it is not.

4-11-00, Brad Reel - As of right now, the "Command Center" page (Requests to be Processed) should not be an option for the start page, and is not even planned for the ARMS Web system.

Issue Number: 434

Question: 07-06-00 - Brad Reel: The ARMS Web redesign has a requirement that the system would allow the user to choose the page in the system they could use as their start-up page. Their options were: the Command Center Page, the Action Items Page, or the Create Reservation Page. Based on the way the system has been designed to process since that time, it does not seem to make sense to be able to choose anything other than the Action Items page as a user's start page. The profile build team suggests removing the option to allow a user to choose their start page from the user profile.

07-07-00 - Brad Reel: Feedback from the technical team and the business suggests that it may make more sense to have Create Reservation as an option, and have it process in a different manner than the normal create reservation process. The main advantage of this would be First Notice of Loss Adjusters. There was also consensus that if the ability to select your start page is removed in this release, it should be possible to easily add it back in the future.

07-07-00 - Brad Reel: Upon speaking to the database and build teams, it should not be difficult to add the functionality back to the system in a future release. A user's start page was set up as an attribute of a user, and since there will still be other attributes for a user, the start page will just be a new attribute when it is added back. Therefore adding the ability to choose a start page in a future release should not be difficult.

07-07-00 - Brad Reel: This issue is being assigned to Sean O'Donnell for review of the feasibility and impacts to the create reservation process if a user is allowed to enter the create res page without having entered the initial required fields (i.e. Claim #, Claim Type, Renter Last Name, etc.). This issue should be discussed for resolution at the 07-17 issues meeting and is being assigned to Craig Lalumandier as resolution contact until it is resolved. Upon resolution, this issue may need to be assigned back to Brad Reel so that the decision can be implemented into the user profile.

Status: Closed - Resolved

Resolution: 07/17/00 [Craig L.] - For the initial release, the start page will not be profiled. This feature would not be difficult to add in the future.

Sean O'Donnell 07-11-2000 - I would NOT recommend allowing users to have the create reservation page selected as their 'Start Page' for the following reasons;

- the reason(s) we split the reservation process into two pages to begin with still exist 1) to have the information to perform authorized and unauthorized matches to ensure that the reservation that

ARMS Redesign Project - Release 1.0

Issue: 1.0

User Profile

Issue Date: 10/20/00

is being created does not already exist, 2) to get the 'where needed' information to retrieve a location & rates, 3) to get the claim type information up front so that we can build the authorization section of the create reservation page appropriately.

- if we change the process to support 'FNOL' adjusters differently than the 'normal' way of creating a reservation, use of the application will be inconsistent.

Please contact me if there are concerns with these statements.

Automated Extensions

Insurance company wishes to automate part or all of their extension process through ARMS.

There will be three options available for this automation

Auto Extension

Option 1

Automated System Extensions

System automatically extends rental each time a request for extension is received from Enterprise. System will only be authorized to extend a rental for the number of days equal to 25% of the total days initially authorized by the adjustor.

Example

Initial Authorization was for 12 days. An extension request is sent for 5 additional days. System auto extends the rental for 3 days (25% of original auth) and an extension request is created in the adjustor's action items for the remaining 2 day extension.

Option 2

Automated Extension based on labor hours or down time

Insurance company electronically sends ARMS the total number of days the repairs should take, or the labor hours for the repairs (which Enterprise will convert to days). If the authorized number of days that exists on the open file is less than the number of labor hours/down time days ARMS automatically extends the rental to equal the number of labor hours/down time days.

Example

Initial Authorization was for 6 days. The adjustor views the renter's vehicle and estimates 8 days down time. When the 8 days down time is entered into the Claims systems and automatically sent to ARMS, the rental will be automatically extended for 2 additional days.

Option 3

Automated Extension based on ARMS Automotive Status

Insurance company agrees to allow status updates made by preferred Bodyshops in ARMS Automotive to automatically generate rental extensions in ARMS Claims.

Example

Joe's Bodyshop, a preferred shop for ABC Insurance, enters in a shop status and estimated completion date in ARMS Automotive. The entry of the Estimated completion date automatically triggers an extension within ARMS Claims to extend the rental up through the Estimated completion date.

ARMS Claims		Training System	
		Patent Pending	
		8/30/01	
Create A Reservation	Find A Customer	Action Items	Completed Actions Reports My Profile Help

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Extend Rental: for ABRAHMS, KELLY Claim no. 145258841 CUSTOMER FILE

7 of 14 Action Items

Coverage Extension requested for:

3 additional authorized days @ Other

View Cars

Extend Coverage

Car Class:

premium

Daily Rate:

/day

21.99

Note to Enterprise:

Note to Self Only:

Messages:

8/19/01 1:32 PM R - RENTAL EXTENSION REQUESTED FOR 003 DAYS

8/19/01 1:32 PM R - PAINT WORK IN PROGRESS, CAR IS IN PAINT

8/19/01 1:32 PM R - BOOTH, SHOULD BE DONE ON MONDAY.

8/15/01 12:47 PM R - TICKET 071932 OPENED @ 12:46:00

S= Sent, R= Received, H= Note To Self

! All times are CST

Go to Notebook

Current Rental Status:

Open Rental

Rental Start Date:

8/15/01

Last Authorized Date:

8/19/01

Days Authorized to Date:

5 days @ \$ 21.99 /day

Coverage Authorized to Date:

5 days

Authorized Total:

\$ 109.95*

Direct Bill %:

100%

*Does not include taxes and surcharges

Rental Location:

ENTERPRISE RENT-A-CAR (PPGM)

(314) 512-0284

Repair Facility:

TLT AUTO REPAIR

(887) 854-3210

Owner's Vehicle: 1995 CIVIC

Vehicle Condition: Unknown

Set Last Day

Process

Skip >>

ARMS Claims

Training System

Patent Pending

8/24/01

Create A
ReservationFind A
Customer

Sync | Action Items

Completed Actions

Reports

My Profile

Help

Sync Log

Preferences

History

Claims Office: **01 ST. LOUIS - NORTH**Assigned to: **Yourself****Action Items:** Welcome Back CALI SUMMER.

Off-line Sync

Below please find the action items that require your attention.

To sort the Action Items, click the column title of your chosen sorting method
ex: to sort by date, click ("DATE RECEIVED")

	TYPE	DATE RECEIVED	RENTER'S NAME	CLAIM NUMBER	ADJUSTER
!	Direct Bill Request	8/10/01	GREEN, SARAH	25698745	SUMMER, CALI
!	Direct Bill Request	8/10/01	MILLER, KIM	59834177	SUMMER, CALI
!	Message	7/30/01	HAYES, KARI	4837912586	SUMMER, CALI
!	Message	8/13/01	MURPHY, RANDY	4507985861	SUMMER, CALI
!	Message (Pending)	8/13/01	PENA, KALISA	2185635698	SUMMER, CALI
!	Message (Pending)	8/13/01	RAMIREZ, PHILIP	5918398217	SUMMER, CALI
!	Extension	8/12/01	ABRAHMS, KELLY	1452569841	SUMMER, CALI
!	Extension	8/13/01	JONES, MARK	1458796541	SUMMER, CALI
!	Extension	8/11/01	MONTANA, KIM	4578145254	SUMMER, CALI
!	Extension	8/13/01	OWENS, JONNA	1452587474	SUMMER, CALI
!	Extension (Pending)	8/10/01	GEYER, ZADIK	3658784212	SUMMER, CALI
!	Extension (Pending)	8/10/01	GIEBS, PAULA	2597413695	SUMMER, CALI
!	Extension (Pending)	8/13/01	JOHNSON, KRISTA	58983217875	SUMMER, CALI
!	Unassigned Name	8/10/01	16725-1011111111		UNASSIGNED

Unassigned Name List

! Over 24 hours old.

! New information has come in.

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ARMS Claims Remote Processing

Button Description:

Sync Up

ARMS Claims lets you keep copies of your action items and store them locally on your computer as offline transactions. ARMS Claims can automatically update the contents of transactions on the local machine and the main system. Or you can manually synchronize the transactions and then continue to work offline. When ARMS Claims synchronizes your transactions, it copies the changes made on each system and then disconnects. Any items that's deleted from either the offline transaction set or the main application is deleted from both. After you work offline and re-establish your connection to ARMS Claims, the Sync up option is utilized to update the main system.

Preferences

The preferences button provides the adjuster the ability to establish defaults for automatic syncing of the data. Other preferences would include options on how syncing issues when offline and main system transactions are updated.

History

The history button will display all of the sync events over a specified period of time. It will display any error messages and resolution to sync conflicts (i.e. the main system was updated after the local record was updated which record takes precedence.)

ARMS Claims

Automated Rental Management System
Patent Pending

Please enter your User ID and Password using upper and lowercase letters where needed.

Login Here:

User ID


Password

Login

☐ Remember my User ID & Password

ARMS Training

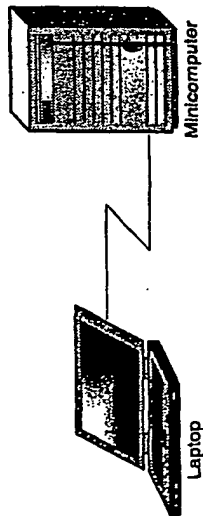
[Privacy Policy](#)


Off-Line Sync

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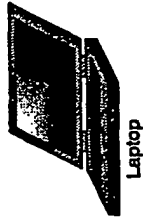
ARMS Claims Offline Access

Step 1: Adjust is attached to the ARMS Claims system through an Internet connections

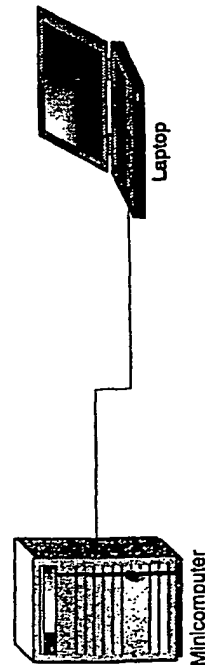


Step 2: The adjuster selects the synchronize file options to download all of his ARMS Claims data to a database on his system.

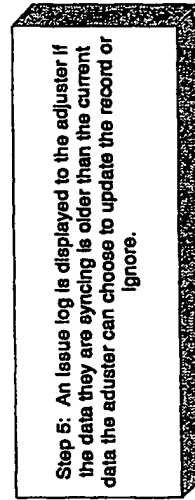
Step 3: The adjuster then disconnects from the Internet site and can now access the ARMS claims programs on his laptop to work offline. These programs use the data downloaded during the sync process to allow the adjuster to create reservations, authorize direct bills, extend rentals, approve invoices and set last day on rentals.



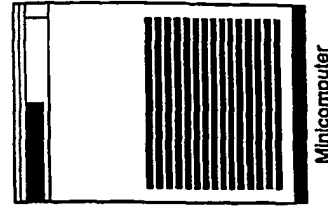
Laptop



Step 4: Once the adjuster re-establishes a connection to the ARMS Claims product he selects the Re-sync option which will port the data to the main databases.



Step 5: An issue log is displayed to the adjuster if the data they are syncing is older than the current data the adjuster can choose to update the record or ignore.



Minicomputer

Step 6: The data is re-synced with the main system. All records and data fields are updated real time.

Power Templates

ARMS Claims		Training System	
		Patent Pending	
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
		Help	

Claims Office: **01 ST. LOUIS - NORTH**Assigned to: **Yourself**

Extend Rental:

QUICK EXTENSION

Check all of the items you would like to extend.

Extend	Renter Name	Claim / P.O. Number	Authorized to date	Days Requested
<input type="checkbox"/>	Donovan, Art	2546953125	22 days	<input type="text" value="1"/> days Set Last Day
	Adjuster: Weeb Eubanks	Total Days Authorized: 15 days	Rate: \$25.99	
	Claim Type: Insured	Total to date: \$159.81		
<input type="checkbox"/>	Washington, Don	1245893587	15 days	<input type="text" value="10"/> days Set Last Day
	Adjuster: Weeb Eubanks	Total Days Authorized: 15 days	Rate: \$25.99	
	Claim Type: Insured	Total to date: \$159.81		
<input type="checkbox"/>	Leaks, Roosevelt	1245893587	2 days	<input type="text" value="1"/> days Set Last Day
	Adjuster: Weeb Eubanks	Total Days Authorized: 15 days	Rate: \$25.99	
	Claim Type: Insured	Total to date: \$159.81		
<input type="checkbox"/>	Donovan, Ben	2546953125	22 days	<input type="text" value="3"/> days Set Last Day
	Adjuster: Weeb Eubanks	Total Days Authorized: 15 days	Rate: \$25.99	
	Claim Type: Insured	Total to date: \$159.81		

[Uncheck All](#)[Extend Rental](#)

ARMS Claims		Training System	
Create A Reservation	Find A Customer	Action Items	Completed Actions Reports My Profile Help

Claims Office: **01 ST. LOUIS - NORTH** Assigned to: **ADAMS, KYLE**

Action Items: Welcome Back CALL SUMMER.
Below please find the action items that require your attention.
To sort the Action Items, click the column title of your chosen sorting method
ex: to sort by date, click ("DATE RECEIVED")

TYPE	DATE RECEIVED	RENTER'S NAME	CLAIM NUMBER	ADJUSTER
Extensions	8/17/01	(4) Extensions		ADAMS, KYLE
Unassigned Items	8/17/01	(6) Action Items		UNASSIGNED

Over 24 hours old.
New information has come in.

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ARMS Claims		Training System	
		Patent Pending	
		E031031	
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
		Help	

Claims Office: 01 - ST. LOUIS - NORTH

Administration:

MYPROFILE

Add/Edit My Favorites List

Process

Name	Address	Remove this branch	Options
			<input checked="" type="checkbox"/> Edit or change the name of the branch. <input checked="" type="checkbox"/> Remove this branch. <input checked="" type="checkbox"/> Search for a new office to add to your list.

Add A Different Office

Out of Office

☒ Select feature setting

☐ On ☐ Off

☒ Please select the first day you'll be out of the office.

First Day Out: August 31 2001

☒ Please select an Adjuster to handle your accounts.

Office 01: Adjuster:

Office 02: Adjuster:

My Settings

Change Password:

Old Password:

New Password:

Confirm Password:

☒ Type in your current password.

☒ Type in your new password using at least six alphanumeric characters.

☒ Confirm your new password.

Confirmation Page:

Show Confirmation Page? ☐ On ☐ Off

E-Mail Notifications:

E-Mail Address:

☐ No E-mail

☐ E-mail Each Item

☐ Notify Me Twice Daily

Preferences:

Extensions: ☐ Display List ☐ Display Individually

Direct Bill Requests: ☐ Display List ☐ Display Individually

Invoice Billing: ☐ Display List ☐ Display Individually

☒ Top of Page

Process

Power Templates

The purpose of the power templates is to allow the adjuster to quickly update all action items without having to go into the details. The adjuster is presented with the required information to extend, authorize, approve invoice, or set last day on the rental. If the adjuster wishes to view the details, a hyperlink is simply selected.

Adjuster Service
Concepts

ARMS Claims		Training System	
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
		Help	

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Extend Rental: for ABRAHMS, KELLY Claim no. 1452589841
CUSTOMER FILE

7 of 15 Action Res

Extension requested for: <input type="text" value="3"/> additional authorized days @ <input type="text" value="Other"/> <input type="button" value="View Cars"/>		Note to Enterprise: <input type="text"/> <input type="button" value="Service Warning"/>
<input type="button" value="Extend Rental"/>		Note to Self Only: <input type="text"/> <input type="button" value=""/>
Car Class: <input type="text" value="premium"/>	Daily Rate: <input type="text" value="21.99"/>	
Messages: 8/19/01 1:32 PM R: RENTAL EXTENSION REQUESTED FOR 003 DAYS 8/19/01 1:32 PM R: PAINT WORK IN PROGRESS, CAR IS IN PAINT 8/19/01 1:32 PM R: BOOTH SHOULD BE DONE ON MONDAY 8/16/01 12:47 PM R: TICKET 07-1932 OPENED @ 12:46:00 C= Sent To: Received, N= Note To Self All times are CST <input type="button" value="Go to Notebook"/>		Rental Location: ENTERPRISE RENT-A-CAR (PPGM) (314) 512-0284 Repair Facility: TLT AUTO REPAIR (987) 654-3210 Owner's Vehicle: 1995 OMC Vehicle Condition: Unknown
Current Rental Status: Rental Start Date: 8/15/01 Last Authorized Date: 8/19/01 Days Authorized to Date: 5 days @ \$21.99/day Authorized Total: \$109.95 (Does not include taxes and surcharges) (Does not include taxes and surcharges)		Open Rental: 8/15/01 8/19/01 5 days @ \$21.99/day \$109.95 100%
		<input type="button" value="Get Last Day"/> <input type="button" value="Process"/> <input type="button" value="Skip >>"/>

ARMS Claims		Training System	
Create A Reservation	Find A Customer	Action Items	Completed Actions Reports My Profile Help

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Extend Rental: for ABRAHMS, KELLY Claim no. 1452569841
CUSTOMER FILE

7 of 15 Action Items

Extension requested for: <input type="checkbox"/> additional authorized days @ <input type="checkbox"/> Other <input type="button" value="Extend Rental"/>		Note to Enterprise <input type="button" value="Service Warning"/>	
Car Class: <input type="text" value="premium"/>		ARMS Service Warning - Adjuster Satisfaction Issue 5322-8	
Messages: 8/19/01 1:32 PM R - RENTAL EXTENSION R 8/19/01 1:32 PM R - PAINT WORK IN PROG 8/19/01 1:32 PM R - BOOTH SHOULD BE D 8/15/01 12:47 PM R - TICKET 071932 OPEN E S - Sent, R - Received, N - Note to Self All times are CST Go to Notebook		Please describe your situation to us so that we may address it immediately: <input type="text"/> <input type="text"/>	
Current Rental Status: Open Rent Rental Start Date: 8/15/01 Last Authorized Date: 8/19/01 Days Authorized to Date: 5 days @ \$ Authorized Total: \$ 109.85 Direct Bill %: 100% Does not include taxes and surcharges		Please let us know whom we should contact to resolve this issue: <input type="text"/> Phone number of Contact <input type="text"/>	
		<input type="button" value="Send Warning"/>	
		<input type="button" value="Set Last Day"/> <input type="button" value="Process"/> <input type="button" value="Skip >>"/>	

ARMS Claims

Training System

Patent Pending

8/31/01

Create A
ReservationFind A
Customer

Action Items

Completed Actions

Reports

My Profile

Help

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Extend Rental: for ABRAHMS, KELLY Claim no. 1452568841
CUSTOMER FILE

7 of 15 Action Items

Extension requested for:

3 Additional authorized days @ Other View Cars

Extend Rental

Car Class: premium Daily Rate: \$21.99

Note to Enterprise:

Service Warning

Note to Self Only:

Messages:

8/19/01 1:32 PM R- RENTAL EXTENSION REQUESTED FOR 003 DAYS

8/19/01 1:32 PM R- PAINT WORK IN PROGRESS, CAR IS IN PAINT

8/19/01 1:32 PM R- BOOTH SHOULD BE DONE ON MONDAY

8/15/01 12:47 PM R- TICKET 071892 OPENED @ 124600

Car Sent to factory, No Note to Self

All Enterprise CST

On to Notebook

Rental Location:

ENTERPRISE RENT-A-CAR (PPGM)
0141512-0284

Repair Facility:

TILT AUTO REPAIR

(987) 654-3210

Owner's Vehicle: 1985 CIVIC

Vehicle Condition: Unknown

Current Rental Status:

Open Rental

Rental Start Date:

8/15/01

Last Authorized Date:

8/19/01

Days Authorized to Date:

5 days @ \$21.99/day

Authorized Total:

\$109.95*

Direct Bill %:

100%

*Does not include taxes and surcharges

Get Last Day

Process

Skip >>>

Enterprise Rent-A-Car ArmsClaims Adjuster Satisfaction

Friday, August 31, 2001

Process Control
Transaction Type
Quick Check
Comments
ESQI Value
5 Points
20 Points

The adjuster can elect to log a quick check or they can request to add comments. In the event that a quick check is requested by the adjuster and the cumulative value of 20 points toward a claim is reached, the system will request comments.

Process Control
Escalation Threshold
10 Points
20 Points
40 Points
60 Points
80 Points
Escalation point
Branch Manager
Comment Request
Area Manager
Region Manager
Group Manager

When a creation branch employee receives enough points to cross a threshold, the appropriate notification message is sent to the employee in the escalation hierarchy. Also, notified are the management personnel at the lower notification levels.

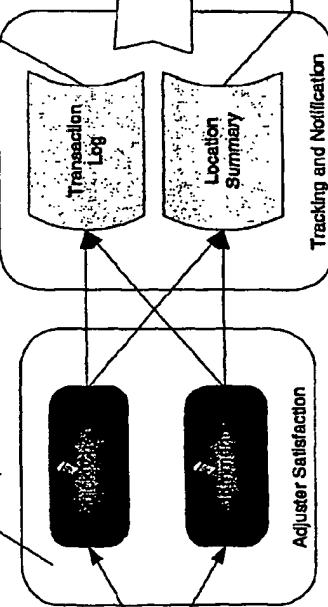
Enterprise
Employee



Transaction Statistics
Customer
Office
Adjuster
Transaction type
ESQI value
Notes

Escalation and Notification

Location Statistics
Customer
Office
Adjuster
Cumulative ESQI Rating
Rolling ESQI Rating



Process Control
Rolling Window-Size
80 Days
Drop-off ESQI value
10 Points

Daily, an assessment of the last 80 days of issues is made. If the current sum of logged points is less than the running total, the running total is reduced to the larger of either the new running total or the existing total minus the drop-off value.

ARMS Claims

Training System

Patent Pending

8/20/01

Create A
ReservationFind A
Customer

| Action Items

| Completed Actions

| Reports

| My Profile

| Help

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Create Reservation: for FITZ, NEIL Claim no. 2453562222
QUICK FORM

Adjuster

* Denotes required field

RENTAL INFORMATION		NOTEBOOK		
Authorized Days:	<input type="text"/>	Use Policy Limits	<input checked="" type="checkbox"/> View Cars	
Policy Daily rate:	Please choose			
Maximum dollars:				
Percent of Rental:	100 %			
Vehicle Condition:	Please choose			
RENTER INFORMATION		Note to Enterprise:		
Last Name:	FITZ		First Name:	NEIL
Email:	<input type="text"/>		<input type="checkbox"/> send email confirmation	
Phone Numbers: (a home or work phone number is required)				
(314) 512-5000	Ext:	<input type="text"/>	Home	<input checked="" type="checkbox"/>
<input type="text"/>	Ext:	<input type="text"/>	Work	<input checked="" type="checkbox"/>
Location closest to:		(314) 512-5000		
ENTERPRISE RENT-A-CAR (0139)				
7730 BORN TO RME AVENUE				
CLAYTON, MO 63105-1909				
(314) 667-4488				
Pick a different location:		<input type="text"/>		
No Favorite Location Found		<input checked="" type="checkbox"/> Add location		
Cancel		Confirm Reservation		

CLAIM INFORMATION	
Claim Number:	2453562222
Claim Type:	Insured
Coverage Adjuster:	Cecil Fitzgerald

ADDITIONAL INFORMATION	
Date of Loss:	<input type="text"/>
Repair Facility:	<input type="text"/>

ARMS claims		Training System	
		Patent Pending	
8/30/01			
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
			Help

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Extend Rental: for ABRAHMS, KELLY Claim no. 1462589841
CUSTOMER FILE

7 of 14 Action Items

Coverage Extension requested for:		Note to Enterprise:	
3	Additional authorized days @ Other		
Extend Coverage		Note to Self Only:	
Car Class:	Daily Rate:		
premium	\$ 21.99		
Messages: 8/30/01 1:32 PM R- RENTAL EXTENSION REQUESTED FOR 000 DAYS 8/30/01 1:32 PM R- PART WORK IN PROGRESS, CAR IS IN PART 8/30/01 1:32 PM R- BOOTH SHOULD BE DONE ON MONDAY 8/30/01 12:47 PM R- TICKET 071932 OPENED @ 12:40:00 Sent to Received Note to Self Call times are CST Go to Notebook		Rental Location: ENTERPRISE RENT-A-CAR (PPOM) (315) 612-0294 Repair Facility: TLT AUTO REPAIR (887) 334-3210 Owner's Vehicle: 1995 GMC Vehicle Condition: Unknown	
Current Rental Status: Rental Start Date: 8/15/01 Last Authorized Date: 8/30/01 Days Authorized to Date: 5 days @ \$21.99/day Coverage Authorized to Date: 6 days Authorized Total: \$409.85 Direct bill %: 100% Does not include taxes and surcharges		Set Last Day Process Skip >>	

ARMS Claims - Multiple Adjusters

The Adjuster profile tab provides the owning adjuster the ability to establish task (extend, authorize, invoice) authority on a claim

Creating a Reservation

The adjuster creates a reservation for a claim. The detail reservation page displays the transaction owners and provides the adjuster the ability to change those owners.

Once the reservation is created the transaction owners are notified that a reservation transaction has been created.

The owner and transaction owners can view the status of the claim in their action items.

Extending a Reservation

When an extension request is sent in from the Body Shop or Branch the system checks to see which adjuster is managing this transaction.

The request is sent to the appropriate adjuster and a message is sent to the owning adjusters and transactions owners to let them know an extension has been requested.

Once the extension is granted or denied the owning adjuster and transaction owners are notified.

The same process occurs for the invoice process

Transferring claim

When a claim is transfered by the owning adjuster to another adjuster. The transferee can choose to maintain the same transaction owners or transfer to his/h r defaults

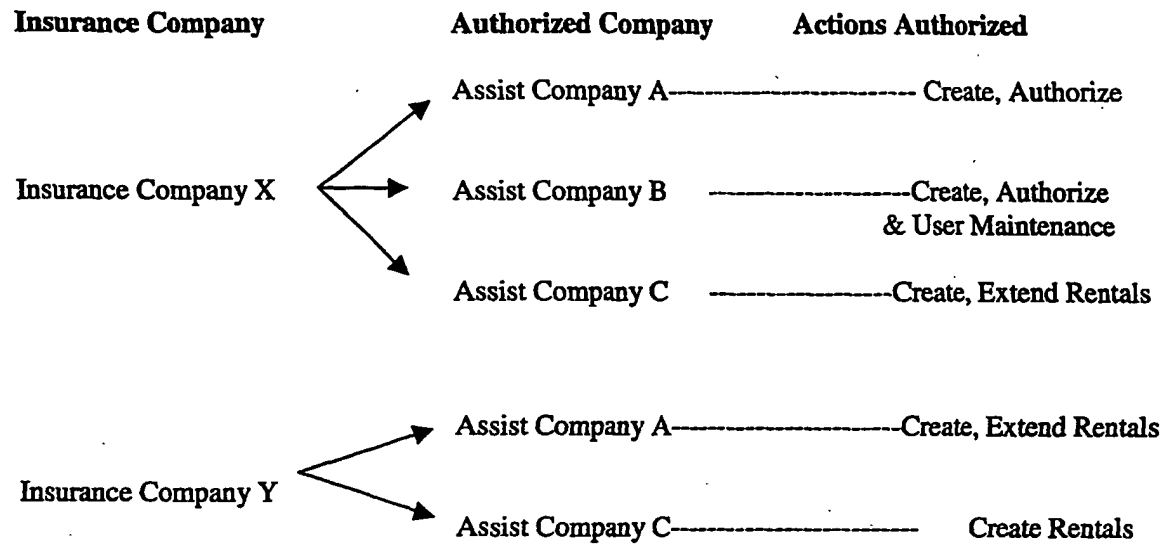
When a claim is transfered all involved adjusters are notified, the history file is updated and the branch notes are updated.

Assist Company Example

Third Party
Management

The insurance company decides which actions a third party user can make with respect to claims for which the insurance company will ultimately be responsible for payment.

Example:



This means that....

When Mr. A of Assist Company A logs onto ARMS, Mr. A will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. A of Assist Company A can Create and Authorize rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

Action 1
Action 2
Action 3

Mr. A of Assist Company A can Create and Extend rentals for Insurance Company Y, but do nothing more for Company Y.

Mr. A cannot see or work on anything that has been assigned to Assist Company B or Assist Company C as he is from Assist Company A and all his access is limited to Assist Company A.

When Mr. B of Assist Company B logs onto ARMS, Mr. B will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. B of Assist Company B can Create and Authorize rentals for Insurance Company X and do nothing more for Company X. Mr. B can do nothing for Company Y as they have no authorization from Company Y.

Mr. B will assign and maintain the user access for others at Assist Company B pertaining to Company X as he has been give that access by Company X.

Mr. B cannot see or work on anything that has been assigned to Assist Company A or Assist Company C as he is from Assist Company B and all his access is limited to Assist Company B.

When Mr. C of Assist Company C logs onto ARMS, Mr. C will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. C of Assist Company C can Create and Extend rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

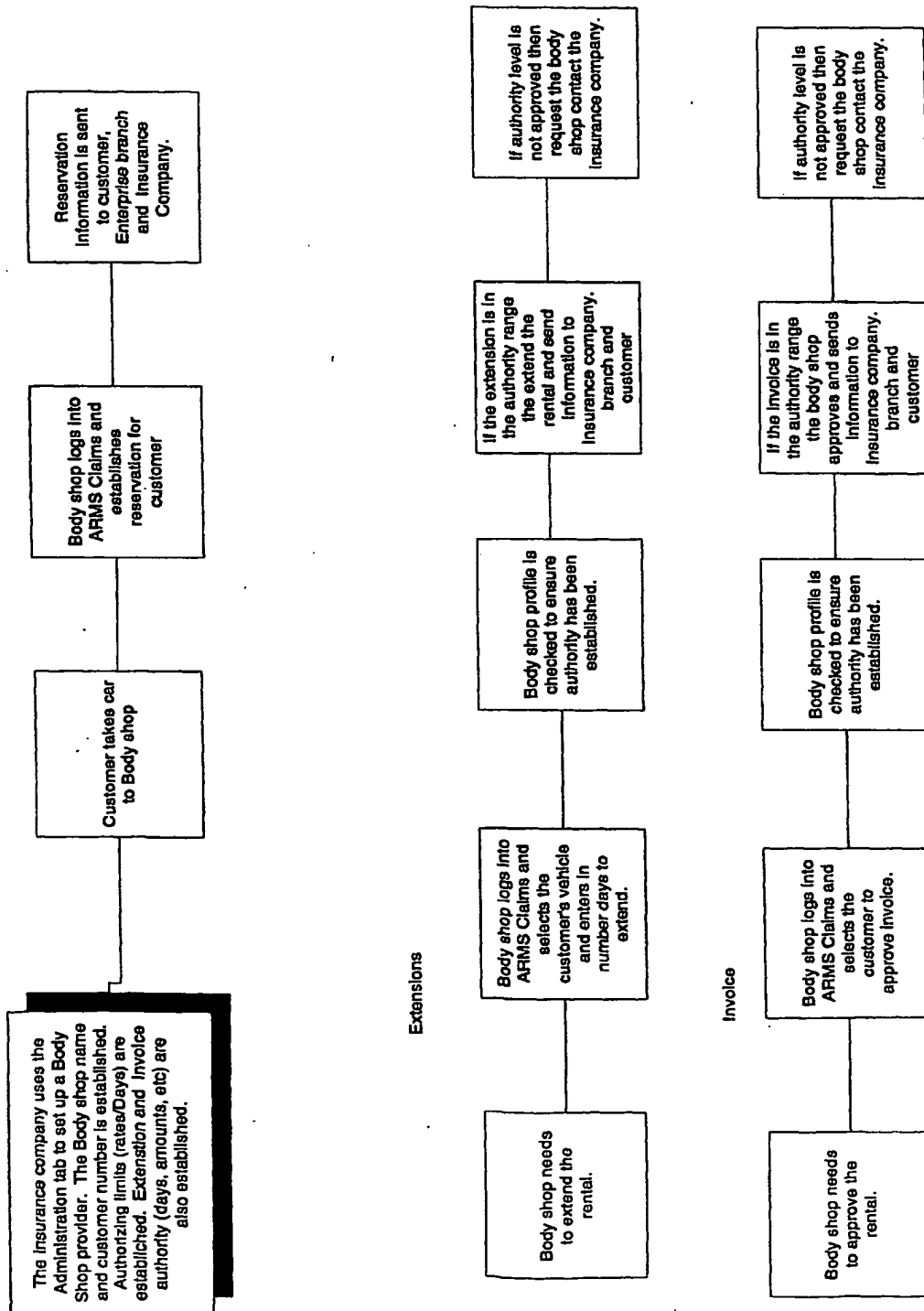
Action 1
Action 2

Mr. C of Assist Company C can Create rentals for Insurance Company Y, but do nothing more for Company Y.

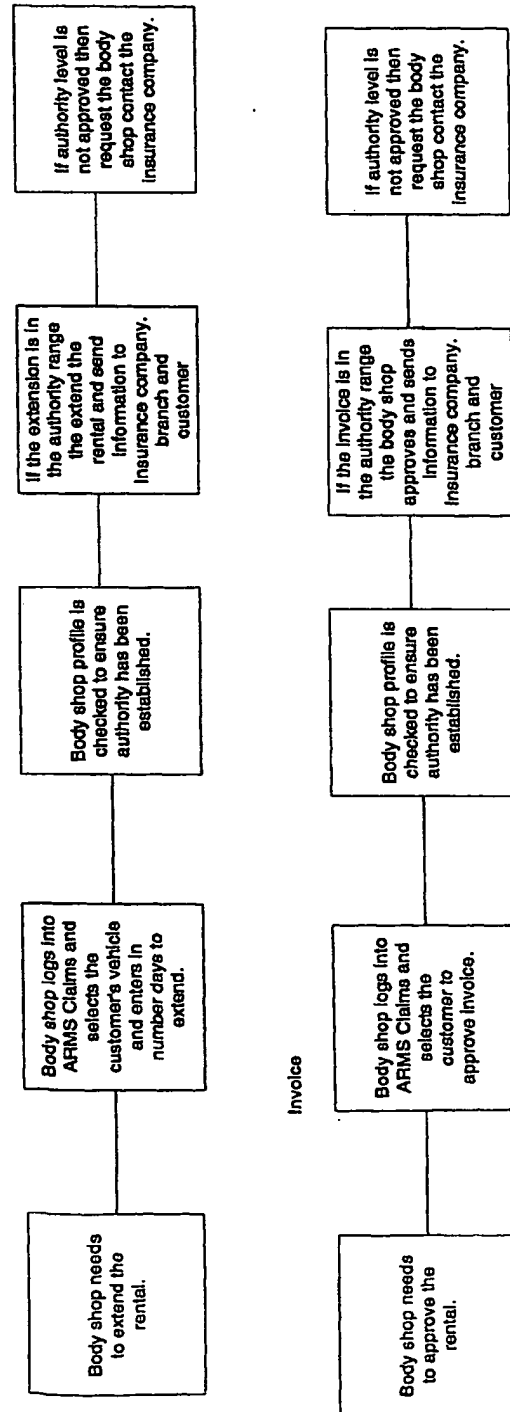
Mr. C cannot see or work on anything that has been assigned to Assist Company A or Assist Company BC as he is from Assist Company A and all his access is limited to Assist Company B.

A. Claims - Approved Third party claims management Body Shop

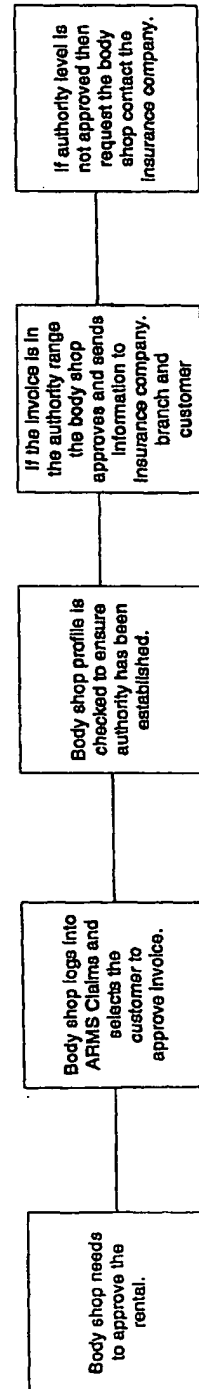
Create Reservations



Extensions



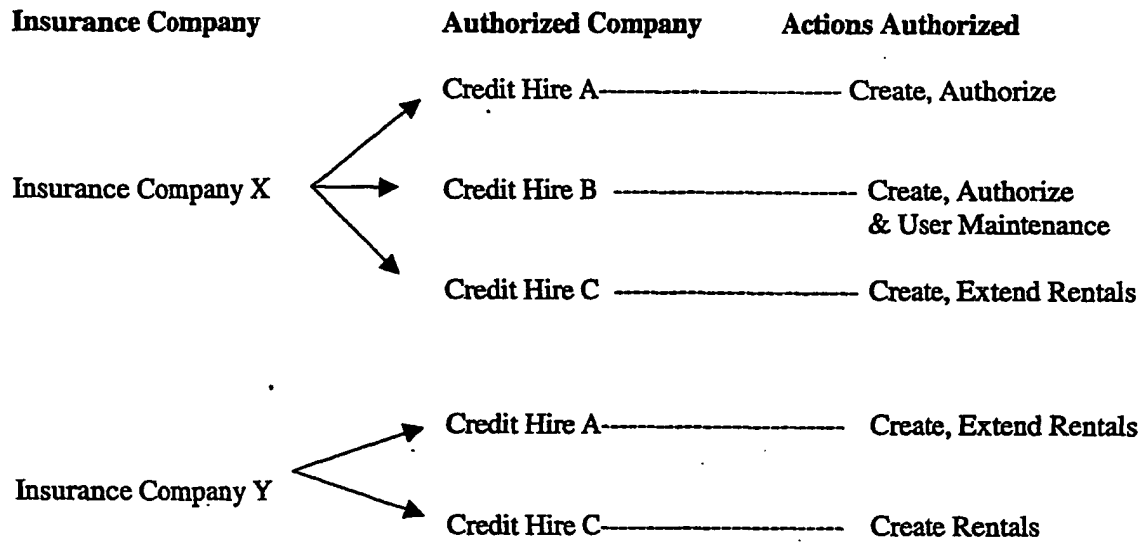
Invoice



Credit Hire Example

The insurance company decides which actions a third party user can make with respect to claims for which the insurance company will ultimately be responsible for payment.

Example:



This means that....

When Mr. A of Credit Hire A logs onto ARMS, Mr. A will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. A of Credit Hire A can Create and Authorize rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

Action 1
Action 2
Action 3

Mr. A of Credit Hire A can Create and Extend rentals for Insurance Company Y, but do nothing more for Company Y.

Mr. A cannot see or work on anything that has been assigned to Credit Hire B or Credit Hire C as he is from Credit Hire A and all his access is limited to Credit Hire A.

When Mr. B of Credit Hire B logs onto ARMS, Mr. B will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. B of Credit Hire B can Create and Authorize rentals for Insurance Company X and do nothing more for Company X. Mr. B can do nothing for Company Y as they have no authorization from Company Y.

Mr. B will assign and maintain the user access for others at Credit Hire B pertaining to Company X as he has been give that access by Company X.

Mr. B cannot see or work on anything that has been assigned to Credit Hire A or Credit Hire C as he is from Credit Hire B and all his access is limited to Credit Hire B.

When Mr. C of Credit Hire C logs onto ARMS, Mr. C will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. C of Credit Hire C can Create and Extend rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

Action 1
Action 2

Mr. C of Credit Hire C can Create rentals for Insurance Company Y, but do nothing more for Company Y.

Mr. C cannot see or work on anything that has been assigned to Credit Hire A or Credit Hire BC as he is from Credit Hire A and all his access is limited to Credit Hire B.

An independent party constitutes a third-party management organization that an insurance company may give permission to manage some or all of the rental transaction. An independent party may consist of, but not limited to the following:

- Credit hire
- Fleet management company
- Assist company
- Lawyer

Functions for each "role" vary by the insurance company authorizing permissions.

An independent party constitutes a third-party management organization that an insurance company may give permission to manage some or all of the rental transaction on behalf of an insurance company. An independent party may consist of, but not limited to the following:

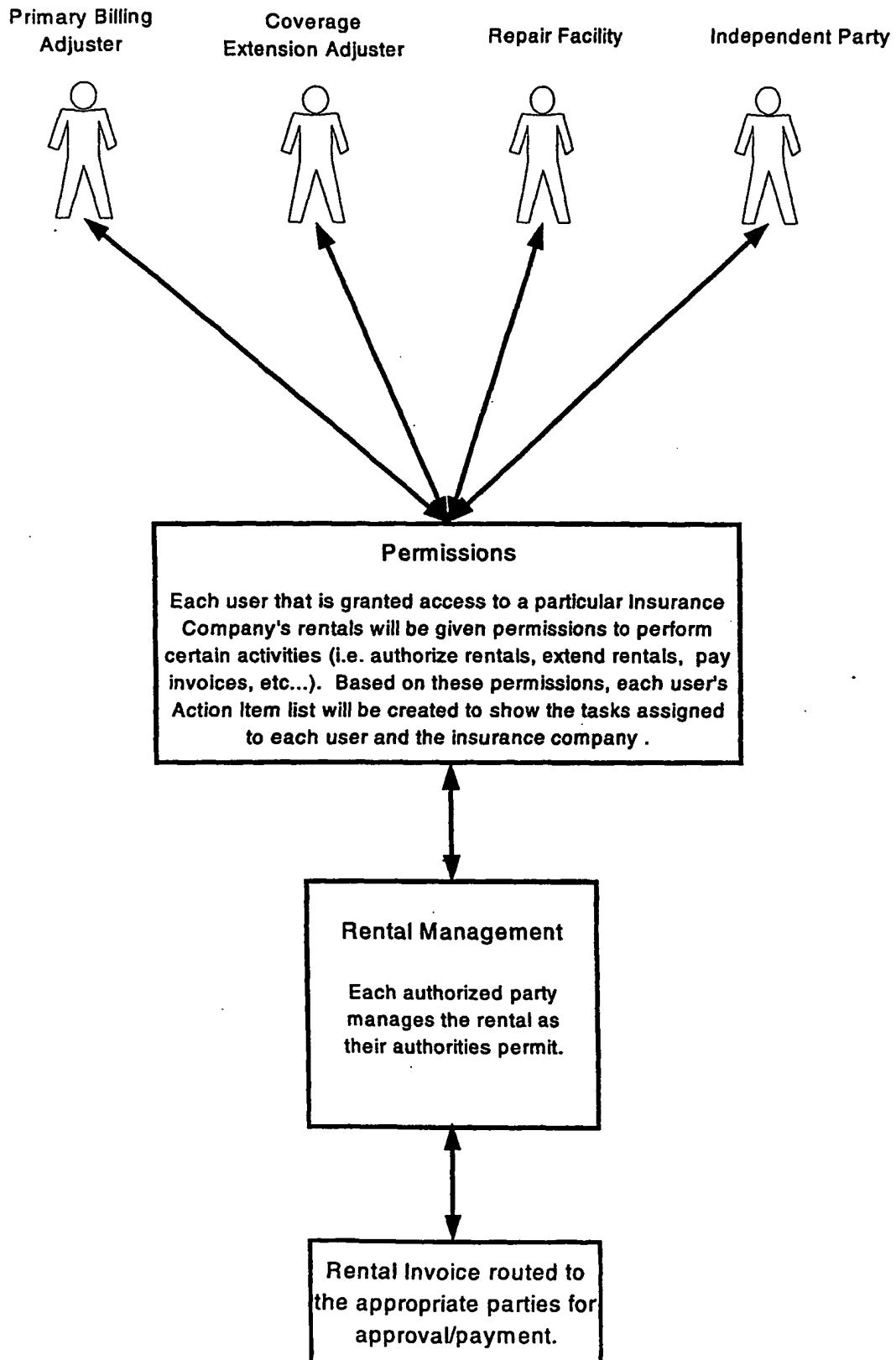
- **Credit Hire**
This is a lawyer in England that represents clients before a claim is filed. The lawyer (credit hire) helps their client get access to rentals, deals with the body shop and medical providers. The credit hire is hired by the renter, or by the person who was involved in the accident.
- **Lawyer**
See Credit Hire example. This person manages the claim for their client. In England, this role is called "Credit Hire," in Germany, it is called "Lawyer."
- **Fleet management company**
Typically, a fleet management company takes care of a fleet for a company, manages the car hire paperwork and authorizations for replacement rentals that are needed when a fleet car is in the shop.
- **Assist company**
This company will take on the task of managing the rental process on behalf of the insurance company in managing the rental portion of the claim due to the accident.

Functions for each "role" vary by the insurance company authorizing permissions. The chart and description below attempt to explain each permission as it pertains to each entity outlined above.

	Own files*	Create/ Authorize Reservations	Maintain/ Extend Rentals	Pay Invoice	User Maintenance **	Reporting (Management)	Receive Unassigned Action Items
Credit Hire (Lawyer)	X	X	X		X	X	X
Fleet Management Company	X	X	X	X	X	X	X
Assist Company	X	X	X		X	X	X

* Own files: this authorization, if granted, will allow the user to have a file (or claim) assigned to him or her.

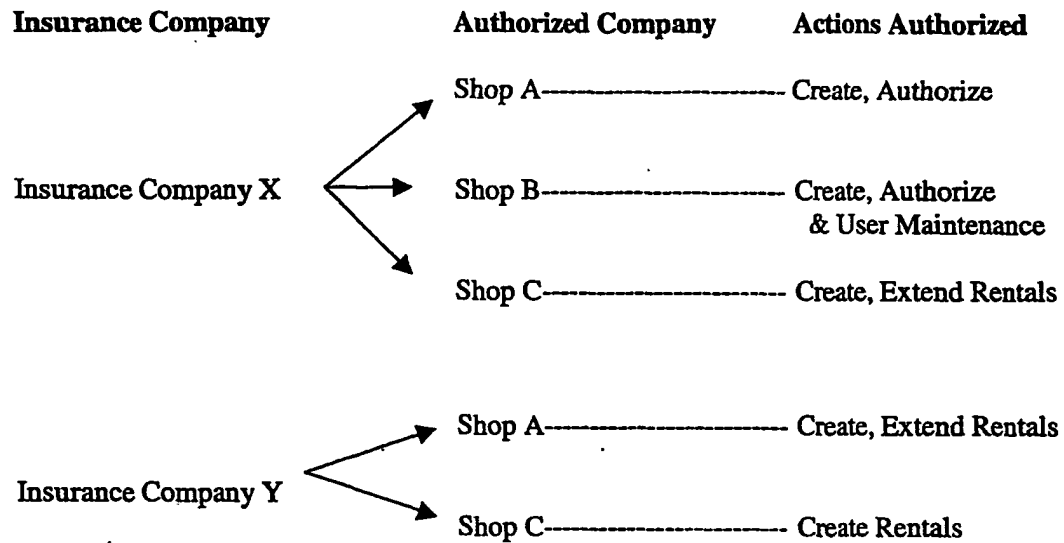
** User Maintenance: A person that is authorized with this capability has the ability to maintain the authorizations for other users within his organization. For example, person "B" at ABC company has access to "user maintenance." Person B can assign the access for persons C and A at ABC company, but not for Mr. D at DEF corporation.



Shop Example

The insurance company decides which actions a third party user can make with respect to claims for which the insurance company will ultimately be responsible for payment.

Example:



This means that....

When Mr. A of Shop A logs onto ARMS, Mr. A will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. A of Shop A can Create and Authorize rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

Action 1
Action 2
Action 3

Mr. A of Shop A can Create and Extend rentals for Insurance Company Y, but do nothing more for Company Y.

Mr. A cannot see or work on anything that has been assigned to Shop B or Shop C as he is from Shop A and all his access is limited to Shop A.

When Mr. B of Shop B logs onto ARMS, Mr. B will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. B of Shop B can Create and Authorize rentals for Insurance Company X and do nothing more for Company X. Mr. B can do nothing for Company Y as they have no authorization from Company Y.

Mr. B will assign and maintain the user access for others at Shop B pertaining to Company X as he has been give that access by Company X.

Mr. B cannot see or work on anything that has been assigned to Shop A or Shop C as he is from Shop B and all his access is limited to Shop B.

When Mr. C of Shop C logs onto ARMS, Mr. C will see a list of action items:

Insurance Company X

Action 1
Action 2
Action 3
Action 4

Mr. C of Shop C can Create and Extend rentals for Insurance Company X, but do nothing more for Company X.

Insurance Company Y

Action 1
Action 2

Mr. C of Shop C can Create rentals for Insurance Company Y, but do nothing more for Company Y.

Mr. C cannot see or work on anything that has been assigned to Shop A or Shop BC as he is from Shop A and all his access is limited to Shop B.

ARMS Claims		Automated Rental Management System	
Create A Reservation	Find A Customer	Action Items	Completed Actions Reports MyProfile Help
10/9/01			

Claims Office: 016 - ENGLEWOOD, CO

Administration:

MODIFY USER

Third Party User

[<< Previous](#) [Process](#)

Last Name: <input type="text" value="Haselhorst"/>	First Name: <input type="text" value="Pondy"/>
User ID: <input type="text" value="AMF12345"/>	E-mail Address: <input type="text"/>
Third Party Type: <input type="text" value="Lawyer"/>	
<input type="checkbox"/> Mail Notifications	
<input type="checkbox"/> Call E-mail	
<input type="checkbox"/> E-mail Each New Item	
<input type="checkbox"/> Notify Me Twice Daily	

Office

Primary Office: <input type="text" value="ARD - ARDEN HILLS"/>			
Address: <input type="text" value="P.O. Box 55582-5555"/>			
City: <input type="text" value="MINNETONKA"/>		State/Province: <input type="text" value="MN"/>	
Phone: <input type="text" value="(612) 555-5555"/>		Postal Code: <input type="text" value="55126-5585"/>	
Available Offices		Authorized Offices	
<div style="border: 1px solid black; padding: 5px;"><input type="checkbox"/> CHN CHANDLER, AZ - IN HOUSE <input type="checkbox"/> DES DES MOINES, IA <input type="checkbox"/> DUL DELUTH, MN <input type="checkbox"/> EDP EDEN PRARIE, MN <input type="checkbox"/> FAR FARGO, ND <input type="checkbox"/> KNC KANSAS CITY MO <input type="checkbox"/> LIN LINCOLN, NEBRASKA</div>		<div style="border: 1px solid black; padding: 5px;"><input checked="" type="checkbox"/> ARD ARDEN HILLS</div>	
Insert >>		<< Remove	
		<input type="checkbox"/> Primary Office	
		*Set Primary Office	

Authorizations

Authorized Limits: <input type="text"/>	Days/Rental: <input type="text"/>
<input type="text"/>	Max/Rental: <input type="text"/>
NOTE: A blank field in Authorized Limits means unlimited authorization.	
File Ownership: <input type="checkbox"/>	
<input type="checkbox"/> Allow files and action items to be assigned to this user.	

Work Authority

Please choose the section of ARMS this user will be able to view:

- ☒ Create/Authorize Reservations
- ☒ Maintain/Extend Rentals
- ☒ Pay Invoice
- ☐ User Maintenance
- ☐ Receive Unassigned Action Items
- ☒ Reporting Management

[<< Previous](#) [Process](#)

[Top of Page](#)

[Create A
Reservation](#)[Find A
Customer](#)[Action Items](#)[Completed Actions](#)[Reports](#)[My Profile](#)[Help](#)

10/9/01

Administration:

MODIFY USER

Create a New User/Team

Create a: ☐ New User ☒ New Team ☐ New Third Party

Primary Office: Last Name: First Name: User ID:

Third Party Description:

Modify/View Users

Find: ☐ User ☒ Team

Primary Office: User Last Name or Team Name:

User/Team Listing: for all users at 01 ST. LOUIS - NORTH

Name	User ID	Primary Office	Office Description
ADAMS KYLE	A007800004	01	ST. LOUIS - NORTH
VICCIONE MARIANNE	A007800005	01	ST. LOUIS - NORTH
DENNISON MICHAEL	A007800006	01	ST. LOUIS - NORTH
EDWARDS DENISE	A007800007	01	ST. LOUIS - NORTH
EDWARDS EILEEN	A007800010	01	ST. LOUIS - NORTH
GONZALEZ MARIA	A007800002	01	ST. LOUIS - NORTH
KNOX KATHY	A007800022	01	ST. LOUIS - NORTH
KRABBE BRENDA	A007800014	01	ST. LOUIS - NORTH
LAFFEY BERN	A007800008	01	ST. LOUIS - NORTH
MCGRATH BRIAN	A007800009	01	ST. LOUIS - NORTH
MEYER THERESA	A007800025	01	ST. LOUIS - NORTH
MURPHY SALLY	A078000022	01	ST. LOUIS - NORTH

ARMS Claims		Automated Rental Management System	
		Patent Pending	
		10/9/01	
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
		Help	

Claims Office: 016 - ENGLEWOOD, CO

Administration:

MODIFY USER

Third Party User

<< Previous

Process

Last Name: <input type="text" value="Haselhorst"/>	First Name: <input type="text" value="Randy"/>
User ID: <input type="text" value="AMN2345"/>	E-mail Address: <input type="text"/>
Third Party Type: <input type="text" value="Lawyer"/>	
E-mail Notifications:	
<input type="checkbox"/> No E-mail	
<input type="checkbox"/> E-mail Each New Item	
<input type="checkbox"/> E-mail Me Twice Daily	

Office

Primary Office: <input type="text" value="ARD - ARDEN HILLS"/>	
Address: <input type="text" value="9700 155th Ave SE"/>	
City: <input type="text" value="MINNETONKA"/>	
Phone: <input type="text" value="(763) 565-5665"/>	State/Province: <input type="text" value="MN"/>
Postal Code: <input type="text" value="55355"/>	
Available Offices:	
<input type="checkbox"/> CHN CHANDLER, AZ - IN HOUSE	
<input type="checkbox"/> DES DES MOINES, IA	
<input type="checkbox"/> DUL DELUTH, MN	
<input type="checkbox"/> EDP EDEN PRARIE, MN	
<input type="checkbox"/> FAR FARGO, ND	
<input type="checkbox"/> KNC KANSAS CITY MO	
<input type="checkbox"/> LIN LINCOLN, NEBRASKA	
Authorized Offices:	
<input type="checkbox"/> *ARD ARDEN HILLS	
Primary Office:	
<input type="button" value="Set Primary Office"/>	

Authorizations

Authorized Limits:	<input type="text"/>	Days/Rental:	<input type="text"/>
	<input type="text"/>	Max/Rental:	<input type="text"/>
Note: A blank field in Authorized Limits means unlimited authorization.			
File Ownership:			
<input checked="" type="checkbox"/> Allow files and action items to be assigned to this user			

Work Authority

Please choose the section of ARMS this user will be able to view:

<input checked="" type="checkbox"/> Create/Authorize Reservations
<input checked="" type="checkbox"/> Maintain/Extend Rentals
<input checked="" type="checkbox"/> Pay Invoice
<input type="checkbox"/> User Maintenance
<input type="checkbox"/> Receive Unassigned Action Items
<input checked="" type="checkbox"/> Reporting (Management)

<< Previous

Process

ARMS Claims		Training System	
Create A Reservation		Find A Customer	
Action Items		Completed Actions	
Reports		My Profile	
Help			

Claims Office: 01 ST. LOUIS - NORTH

Assigned to: Yourself

Create Reservation: for HASELHORST, CONNIE Claim no. 2356546
QUICK FORM

Car Sales

* Denotes required field

RENTAL INFORMATION		NOTEBOOK	
Authorized Days	Use Policy Limits	Note to Enterprise:	
Policy Daily rate	Please choose		
Maximum dollars			
Percent of Rental	100	Note to Self Only:	
Vehicle Condition	Total Loss		
RENTER INFORMATION		Location closest to: (314) 512-5000	
Last Name	HASELHORST	ENTERPRISE RENT-A-CAR (0139)	
First Name	CONNIE	7730 BONHOMME AVENUE	
Email		CLAYTON, MO 63105-1809	
	send email confirmation	(314) 862-4486	
Phone Numbers: (a home or work phone number is required)		Pick a different location:	
(314) 512-5000	Ext.	No Favorite Location Found	
	Home	More Locations	
	Work		
		Cancel Confirm Reservation	

CLAIM INFORMATION	
Claim Number	2356546
Claim Type	Insured

ARMS Claims		Training System	
		Patent Pending	
Create A Reservation	Find A Customer	Action Items	Completed Actions
		Reports	My Profile
		Help	

8/21/01

Claims Office: 01 ST. LOUIS - NORTH **Assigned to:** Yourself

Create Reservation: for HASELHORST, CONNIE Claim no. 2356546 Car Sales
QUICK FORM

notes required field

RENTAL INFORMATION Authorized Days: <input type="text"/> at <input type="checkbox"/> Use Policy Limits <input type="checkbox"/> View Cars Policy / Daily rate / Maximum dollars: <input type="text" value="Please choose"/> Percent of Rental: <input type="text" value="100"/> Vehicle Condition: <input type="text" value="Total Loss"/> Select if new RENTER INFORMATION Last Name: <input type="text" value="HASELHORST"/> First Name: <input type="text" value="CONNIE"/> Email: <input type="text"/> <input type="checkbox"/> Send email confirmation Phone Numbers: (a home or work phone number is required) <input type="text" value="(314) 512-5000"/> Ext.: <input type="text"/> Home <input type="checkbox"/> <input type="text"/> Ext.: <input type="text"/> Work <input type="checkbox"/>	NOTEBOOK Note to Enterprise: <div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> Note to Self Only: <div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> Location closest to: (314) 512-5000 ENTERPRISE RENT-A-CAR (0139) 7730 BONHOMME AVENUE CLAYTON, MO 63105-1900 (314) 862-3480 Pick a different location: <input type="checkbox"/> No Favorite Location Found View Locations <div style="text-align: center; margin-top: 10px;"><input type="button" value="Cancel"/> <input type="button" value="Confirm Reservation"/></div>
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CLAIM INFORMATION
Claim Number: **Claim Type:**

ARMS Claims

Training System

Patent Pending

8/31/01

Create A
Reservation Find A
Customer

| Action Items | Completed Actions | Reports | My Profile | Help |

Car Sales Inventory: Welcome Back CALI SUMMER.

Cars available for sale in the Renter's area are listed below.

Results are based off of a search for: **Haselhorst, Connie****Area Code 63105****FCAR** [Find ACV](#)

Here are your search results. Click on the car model to view details.

Year	Make	Model	Mileage	Price	Color (Exterior/Interior)	more details
2001	Buick	Century	20,400	\$13,994	SILVER/GREY CLOTH	➤
2001	Buick	Century	15,300	\$14,489	BEIGE/BEIGE CLOTH	➤
2001	Buick	Century	26,763	\$13,997	CHARCOAL/GREY CLOTH	➤
2001	Buick	Century	19,500	\$14,494	SILVER/GREY CLOTH	➤
2001	Buick	Century	21,100	\$13,994	WHITE/GREY CLOTH	➤
2001	Buick	Century	18,000	\$14,494	WHITE/GREY CLOTH	➤
2001	Buick	Century	18,600	\$14,494	WHITE/GREY CLOTH	➤
2001	Buick	Century	19,700	\$14,489	SILVER/GREY CLOTH	➤
2001	Buick	Century	18,500	\$14,494	SILVER/GREY CLOTH	➤
2001	Buick	Century	16,500	\$14,489	MAROON/GREY CLOTH	➤

[Next 10 of 317](#) ➤**Search Again**

Zip Code:

Category:

OR

Make:

Model:

1-888-Car-Sales (227-7253)

What is claimed is:

1. An Internet enabled automatic rental vehicle transaction system, said system having an Internet web site through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle reservation to one of a plurality of providers of said rental vehicle services, at least one of said rental
10 vehicle service providers offering a plurality of specific geographically remote rental vehicle locations at which vehicles for rent are situated, said rental vehicle reservation having sufficient information for authorizing, processing and billing said rental vehicle transaction so that
15 a rental vehicle transaction may be automatically processed thereby for any one of said plurality of said rental vehicle service providers.

2. The rental vehicle transaction system of claim 1 wherein said authorized purchaser comprises a business organization, said business organization having a plurality of authorized purchasers, said plurality of authorized purchasers
5 being enabled to access said Internet web site from any location offering Internet web access, and wherein said at least one of said rental vehicle service providers further comprising a second business organization, said second business organization having the computer system and rental
10 vehicle software program resident therein, and wherein said second business organization includes a plurality of geographically diverse rental vehicle locations.

3. The rental vehicle transaction system of claim 2 wherein said rental vehicle software program is configured to permit a rental vehicle reservation to be initiated remote from said authorized purchaser and communicated to said
5 authorized purchaser for authorization.

4. The rental vehicle transaction system of claim 2 wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation through said Internet web site.

5. The rental vehicle transaction system of claim 4 wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation including extending a time period for which said reservation authorizes use of a rental vehicle.

6. The rental vehicle transaction system of claim 4 wherein said software program is configured to permit said authorized purchaser to generate reports relating to rental vehicle reservation activity conducted through said software program.

7. The rental vehicle transaction system of claim 6 wherein said software program further comprises a data base, said data base storing rental vehicle reservation activity for access by said authorized purchasers.

8. The rental vehicle transaction system of claim 7 wherein said software program is configured to automatically communicate billing information to said authorized purchaser for further processing.

9. The rental vehicle transaction system of claim 8 wherein said software program is configured to communicate messages between said authorized purchaser and any others having access to said software program.

10. The rental vehicle transaction system of claim 9 wherein said software program is configured for allowing access through its Internet web site to a plurality of service providers, and for limiting the functionality available to said plurality of service providers.

11. The rental vehicle transaction system of claim 10 wherein said plurality of service providers include vehicle repair facilities.

12. The rental vehicle transaction system of claim 1 further comprising a second computer system, said second computer system having a second computer software program resident thereon, said second computer software program being
5 configured to process rental vehicle transactions at a plurality of geographically diverse branch facilities each of which has a plurality of vehicles for rental, said second computer system being linked to said first computer system.

13. The rental vehicle transaction system of claim 12 wherein each of said first and second computer systems comprises a network having a main frame computer, said main frame computers being linked to each other, and wherein said
5 second computer system further comprises a WAN.

14. The rental vehicle transaction system of claim 13 wherein said authorized purchaser comprises a business organization, said business organization having a plurality of authorized purchasers, said plurality of authorized purchasers
5 being enabled to access said Internet web site from any location offering Internet web access, and further comprising a second business organization, said second business organization having the second computer system resident therein, and wherein said second business organization
10 includes the plurality of geographically diverse rental vehicle locations.

15. The rental vehicle transaction system of claim 14 wherein said first software program is configured to permit a rental vehicle reservation to be initiated remote from said authorized purchaser and communicated to said authorized
5 purchaser for authorization.

16. The rental vehicle transaction system of claim 15 wherein said first software program is configured to permit said authorized purchasers to modify said rental vehicle reservation through said Internet web site.

17. The rental vehicle transaction system of claim 16 wherein said first software program is configured to permit

said authorized purchasers to modify said rental vehicle reservation including extending a time period for which said reservation authorizes use of a rental vehicle.

18. The rental vehicle transaction system of claim 16 wherein said first software program is configured to permit said authorized purchaser to generate reports relating to rental vehicle reservation activity conducted through said first software program.

19. The rental vehicle transaction system of claim 18 wherein said first software program further comprises a data base, said data base storing rental vehicle reservation activity for access by said authorized purchasers.

20. The rental vehicle transaction system of claim 19 wherein said first software program is configured to automatically communicate billing information to said authorized purchaser for further processing.

21. The rental vehicle transaction system of claim 20 wherein said first software program is configured to communicate messages between said authorized purchaser and any others having access to said software program.

22. The rental vehicle transaction system of claim 21 wherein said first software program is configured for allowing access through its Internet web site to a plurality of service providers, and for limiting the functionality available to said plurality of service providers.

23. The rental vehicle transaction system of claim 22 wherein said plurality of service providers include vehicle repair facilities.

24. An automatic rental vehicle transaction system, said system having a graphical user interface (GUI) through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle

reservation to any one of a plurality of vehicle rental
service providers including one having a plurality of specific
10 geographically remote rental vehicle locations at which
vehicles for rent are situated, said rental vehicle
reservation having sufficient information for authorizing,
processing and billing said rental vehicle transaction so that
a rental vehicle transaction may be automatically processed
15 thereby.

25. The rental vehicle transaction system of claim 24
wherein said authorized purchaser comprises a business
organization, said business organization having a plurality of
authorized purchasers, said plurality of authorized purchasers
5 being enabled to access said rental vehicle software program
from any location offering access to said computer system, and
further comprising a second business organization, said second
business organization having the computer system and rental
vehicle software program resident therein, and wherein said
10 second business organization includes a plurality of
geographically diverse rental vehicle locations.

26. The rental vehicle transaction system of claim 25
further comprising a second computer system resident in said
second business organization, said second computer system
having a second computer software program resident thereon,
5 said second computer software program being configured to
process rental vehicle transactions at the plurality of
geographically diverse branch facilities each of which has a
plurality of vehicles for rental, said second computer system
being linked to said first computer system.

27. The rental vehicle transaction system of claim 26
wherein each of said first and second computer systems
comprises a network having a main frame computer, said main
frame computers being linked to each other, and wherein said
5 second computer system further comprises a WAN.

28. The rental vehicle transaction system of claim 27
wherein said rental vehicle software program is configured to

permit a rental vehicle reservation to be initiated remote from said authorized purchaser and communicated to said
5 authorized purchaser for authorization.

29. The rental vehicle transaction system of claim 28 wherein said first software program is configured to permit said authorized purchasers to modify said rental vehicle reservation through said Internet web site.

30. The rental vehicle transaction system of claim 29 wherein said first software program is configured to permit said authorized purchaser to generate reports relating to rental vehicle reservation activity conducted through said
5 first software program.

31. The rental vehicle transaction system of claim 30 wherein said first software program is configured to automatically communicate billing information to said authorized purchaser for further processing.

32. The rental vehicle transaction system of claim 31 wherein said first software program is configured to communicate messages between said authorized purchaser and any others having access to said software program.

33. The rental vehicle transaction system of claim 32 wherein said first software program is configured for allowing access thereto to a plurality of service providers, and for limiting the functionality available to said plurality of
5 service providers.

34. The rental vehicle transaction system of claim 33 wherein said plurality of service providers include vehicle repair facilities.

35. A computer software program to provide an Internet site access by a multi-level business organization to a plurality of service providers including one such service provider having an integrated business, said access being
5 sufficient for placing and monitoring orders for delivery of services by said integrated business, said integrated business including a computer system having a business software program

configured to automatically accept reservations for, and provide administrative control and accounting for, services
10 offered and physically available at a plurality of geographically diverse locations.

36. The computer program of claim 35 wherein said Internet site software program is configured to provide said access to said business software program for a range of functional interactions therewith.

37. The computer program of claim 36 wherein said Internet site computer software program is configured to provide access to an authorized purchaser of a plurality of said service providers' services, said authorized purchaser
5 comprising a multi-level business organization requiring interaction at a plurality of levels of said business software program.

38. The computer program of claim 37 wherein said at least one service provider having an integrated business is itself a multi-level business organization, said business software program providing communication of business
5 information needed to effectively execute reservations placed for delivery of its services, and wherein said Internet site software program is configured to provide interaction between different levels of both of said business organizations.

39. The computer program of claim 38 wherein said Internet site software program is further configured to provide controlled access to said business software program by third party service providers.

40. The computer program of claim 38 wherein said Internet site software is resident on a first computer system and said business software program is resident on a second computer system, and wherein each of said first and second
5 computer systems comprises a network having a main frame computer, said main frame computers being linked to each other, and wherein said second computer system further comprises a WAN.

41. A method for providing an Internet site through which an authorized purchaser comprising a multi-level business organization of rental vehicle services may access a rental vehicle software program and make reservations for any one of a plurality of rental vehicle service providers, at least one of said providers being an integrated business organization with a functional integrated computer system providing access to a plurality of diverse geographic locations at which vehicles for rental are kept, said method comprising the steps of:

providing an Internet site computer system having a software program configured to create Internet access thereto; and
establishing a link between said purchaser's computer system and at least one of said providers computer system; said Internet site software program being further configured to facilitate functional interaction between the software program resident on said rental vehicle provider's business computer system and an authorized purchaser logged onto said Internet site software program.

42. The method of claim 41 wherein said provider's computer system further comprises a main frame computer, and wherein the step of establishing a link includes the step of establishing a link between said authorized purchaser's computer and said main frame computer.

43. A method for providing a GUI interface through which an authorized purchaser of rental vehicle services comprising a multi-level business organization may access a rental vehicle software program resident on a rental vehicle provider's business computer system to thereby conduct rental vehicle business with a plurality of providers including conducting vehicle rental business on at least one of said provider's business computer system, said method comprising the steps of:

10 providing a computer system having a software program
configured to create a GUI interface; and
establishing a link between said two computer systems;
said GUI interface software program being further configured
to communicate with a plurality of providers including
15 facilitating functional interaction between the software
program resident on said at least one rental vehicle
provider's business computer system and an authorized
purchaser logged onto said GUI interface software program.

44. The method of claim 43 wherein each of said computer
systems further comprises a main frame computer, and wherein
the step of establishing a link includes the step of
establishing a link between said two main frame computers.

45. An Internet enabled automatic rental vehicle
transaction system, said system having an Internet web site
through which an authorized purchaser of rental vehicle
services may access a plurality of rental vehicle providers
5 including at least one provider having a rental vehicle
software program resident on a computer system, said rental
vehicle software program being configured to automatically
respond to a series of commands from said authorized purchaser
and communicate a rental vehicle reservation to a centralized
10 destination, said rental vehicle reservation having sufficient
information for authorizing, processing and billing said
rental vehicle transaction so that a rental vehicle
transaction may be automatically processed thereby virtually
without human intervention.

46. The rental vehicle transaction system of claim 45
wherein said software program is configured to permit said
authorized purchasers to generate a report comprised of that
users work load sorted by completion date.

47. A rental vehicle transaction system, said system
comprising an Internet site through a computer, said computer
being networked with a plurality of vehicle rental providers,
at least one of said providers having an integrated computer

5 system connected thereto, and said computer being configured to allow users to place reservations for rental vehicle services with any one of said providers.

48. The transaction system of claim 47 wherein said Internet site computer is further configured to allow data requirements for said reservation to be customized.

49. The transaction system of claim 47 wherein said Internet site is networked through the Internet with said other providers.

50. The transaction system of claim 49 wherein said Internet site is configured to allow customization of menus presented to said users.

51. An Internet enabled automatic rental vehicle transaction system, said system having an Internet web site through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle reservation to one of a plurality of providers of said rental vehicle services, a plurality of said rental
10 vehicle service providers each offering a plurality of specific geographically remote rental vehicle locations at which vehicles for rent are situated, said rental vehicle software program having access to a data base, said data base including at least data corresponding to characteristics of
15 presently available vehicles for rental situated at least at one of said specific geographic locations, said data base being accessible to said authorized purchaser and from which said purchaser may choose a vehicle for rent, said rental vehicle reservation having sufficient information for
20 authorizing, processing and billing said rental vehicle transaction so that a rental vehicle transaction may be automatically processed thereby for any one of said plurality of said rental vehicle service providers.

52. The rental vehicle transaction system of claim 51 wherein said software program is configured to automatically update said data base as reservations are processed in order to maintain said data base for use by subsequent authorized
5 purchasers.

53. The rental vehicle transaction system of claim 52 wherein said computer system comprises a computer network.

54. The rental vehicle transaction system of claim 53 wherein said computer network comprises a first computer for hosting said web site, a second computer for hosting said rental vehicle software program for controlling and processing
5 said authorized reservations, and at least one third computer configured for fulfilling said authorized reservations.

55. The rental vehicle transaction system of claim 54 wherein each of said rental vehicle service providers has its own third computer configured for fulfilling said authorized reservations.

56. The rental vehicle transaction system of claim 55 wherein said authorized purchaser comprises a business organization, said business organization having a plurality of authorized purchasers, said plurality of authorized purchasers
5 being enabled to access said Internet web site from any location offering Internet web access, and wherein each of said plurality of rental vehicle service providers comprises a separate business organization, said separate business organizations each providing their own plurality of
10 geographically diverse rental vehicle locations.

57. The rental vehicle transaction system of claim 56 wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation including extending a time period for which said
5 reservation authorizes use of a rental vehicle.

58. The rental vehicle transaction system of claim 57 wherein said software program is configured to permit said

authorized purchaser to generate reports relating to rental activity conducted through said software program.

59. An Internet enabled automatic rental vehicle transaction system, said system having an Internet web site through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle reservation to one of a plurality of providers of said rental vehicle services, a plurality of said rental
10 vehicle service providers each offering a plurality of specific geographically remote rental vehicle locations at which vehicles for rent are situated, said rental vehicle software program having access to a data base, said data base including at least data corresponding to characteristics of
15 presently available vehicles for rental situated at each of said specific geographic locations, said data base being accessible to said authorized purchaser and from which said purchaser may choose a vehicle for rent, said rental vehicle reservation having sufficient information for authorizing,
20 processing and billing said rental vehicle transaction, and said rental vehicle software program being configured to process said authorized reservation for any one of said plurality of said rental vehicle service providers.

60. The rental vehicle transaction system of claim 59 wherein said software program is configured to automatically update said data base as reservations are processed in order to maintain said data base for use by subsequent authorized
5 purchasers.

61. The rental vehicle transaction system of claim 60 wherein said computer system comprises a computer network.

62. The rental vehicle transaction system of claim 61 wherein said computer network comprises a first computer for hosting said web site, a second computer for hosting said

rental vehicle software program for controlling and processing
5 said authorized reservations, and at least one third computer
for fulfilling said authorized reservations.

63. The rental vehicle transaction system of claim 62
wherein each of said rental vehicle service providers has its
own third computer configured for fulfilling said authorized
reservations.

64. The rental vehicle transaction system of claim 63
wherein said authorized purchaser comprises a business
organization, said business organization having a plurality of
authorized purchasers, said plurality of authorized purchasers
5 being enabled to access said Internet web site from any
location offering Internet web access, and wherein each of
said plurality of rental vehicle service providers comprises a
separate business organization, said separate business
organizations each providing their own plurality of
10 geographically diverse rental vehicle locations.

65. The rental vehicle transaction system of claim 64
wherein said software program is configured to permit said
authorized purchasers to modify said rental vehicle
reservation including extending a time period for which said
5 reservation authorizes use of a rental vehicle.

66. The rental vehicle transaction system of claim 65
wherein said software program is configured to permit said
authorized purchaser to generate reports relating to rental
activity conducted through said software program.

67. A method for providing an Internet site through
which an authorized purchaser, said authorized purchaser
comprising a multi-level business organization, of rental
vehicle services may access a rental vehicle software program
5 and make reservations for any one of a plurality of rental
vehicle service providers, each of said providers being an
integrated business organization with a functional integrated
computer system providing access to a plurality of diverse

geographic locations at which vehicles for rental are kept,
10 said method comprising the steps of:
 providing an Internet site computer system having a
 software program configured to create Internet access thereto;
 and
 establishing a link between said purchaser's computer
15 system and each of said providers' computer systems; said
Internet site software program being further configured to
facilitate functional interaction between the software program
resident on said rental vehicle providers' business computer
systems and an authorized purchaser logged onto said Internet
20 site software program; and
 maintaining a data base of reservation activity handled
by said Internet site.

68. The method of claim 67 further comprising the step
of providing a communication capability over said link to
allow for communication between said authorized purchaser and
said providers.

69. The method of claim 68 further comprising the step
of permitting access to said reservation data base by said
authorized purchaser for generating reports therefrom.

70. The method of claim 69 further comprising the step
of allowing for limiting the functionality of certain
authorized purchasers in using the software program.

71. An Internet enabled automatic rental vehicle
transaction system, said system having an Internet web site
through which an authorized purchaser of rental vehicle
services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program
being configured to automatically respond to a series of
commands from said authorized purchaser and communicate a
rental vehicle reservation to one of a plurality of providers
of said rental vehicle services, at least one of said rental
10 vehicle service providers offering a plurality of specific
geographically remote rental vehicle locations at which

vehicles for rent are situated, said rental vehicle reservation having sufficient information for authorizing, processing and billing said rental vehicle transaction so that
15 a rental vehicle transaction may be automatically processed thereby for any one of said plurality of said rental vehicle service providers, wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation through said Internet web site, wherein
20 said authorized purchaser comprises a business organization, said business organization having a plurality of authorized purchasers, said plurality of authorized purchasers being enabled to access said Internet web site from any location offering Internet web access, and wherein said at least one of
25 said rental vehicle service providers further comprises a second business organization, said second business organization having the computer system and rental vehicle software program resident therein, and wherein said second business organization includes a plurality of geographically
30 diverse rental vehicle locations.

72. The rental vehicle transaction system of claim 71 wherein said software program is configured to permit multiple parties to modify said rental vehicle reservation, and wherein said software program is further configured to restrict
5 actions which each of said multiple parties can effect to thereby control the extent to which said vehicle reservation may be modified by each of said multiple parties.

73. The rental vehicle transaction system of claim 72 wherein said multiple parties are each insurance adjusters and said software program is restricted through an entry instruction generated by said insurance company.

74. The rental vehicle transaction system of claim 72 wherein said multiple parties include at least one agent who is not a member of the same organization employing at least one other of said multiple parties.

75. The rental vehicle transaction system of claim 71 wherein said software program is configured to provide a synching function so that another computer may be selectively connected thereto and, under operator command, a data base in
5 said other computer containing reservation data may be uploaded to a data base in said software program containing a master data base of reservation data, said computer system comparing the data from said two data bases and choosing to store data from each according to a synch protocol at least
10 partially specified by the user.

76. The rental vehicle transaction system of claim 75 wherein said other computer is a mobile computer, and said selective connection is provided over an internet connection.

77. The rental vehicle transaction system of claim 71 wherein said software program is configured to permit the entry of user satisfaction data and transmit said user satisfaction data to an authority for response thereto.

78. The rental vehicle transaction system of claim 71 wherein said software program is configured to provide a menu of action items for selective entry and processing by a user thereof, and further comprising a command through which a user
5 may execute a plurality of entered action items all together without further operator action.

79. The rental vehicle transaction system of claim 71 wherein said software program has access to a data base in which data corresponding to an inventory of vehicles are kept, and wherein said software program is configured to permit a
5 user to access said data base to thereby view replacement vehicles available for transfer to a customer.

80. The rental vehicle transaction system of claim 79 wherein said software program is configured to permit searching of said data base from parameters entered by said user.

81. The rental vehicle transaction system of claim 80 wherein said parameters include at least vehicle valuation.

82. The rental vehicle transaction system of claim 81 wherein said software program is configured to accept authorization for said transfer by an insurance company.

83. An Internet enabled automatic rental vehicle transaction system, said system having an Internet web site through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle reservation to one of a plurality of providers of said rental vehicle services, at least one of said rental
10 vehicle service providers offering a plurality of specific geographically remote rental vehicle locations at which vehicles for rent are situated, said rental vehicle reservation having sufficient information for authorizing, processing and billing said rental vehicle transaction so that
15 a rental vehicle transaction may be automatically processed thereby for any one of said plurality of said rental vehicle service providers, and wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation including extending a time period
20 for which said reservation authorizes use of a rental vehicle.

84. The rental vehicle transaction system of claim 83 wherein said software program is configured to permit multiple parties to modify said rental vehicle reservation, and wherein said software program is further configured to restrict
5 actions which each of said multiple parties can effect to thereby control the extent to which said vehicle reservation may be modified by each of said multiple parties.

85. The rental vehicle transaction system of claim 84 wherein said multiple parties are each insurance adjusters and said software program is restricted through an entry instruction generated by said insurance company.

86. The rental vehicle transaction system of claim 84 wherein said multiple parties include at least one agent who is not a member of the same organization employing at least one other of said multiple parties.

87. The rental vehicle transaction system of claim 83 wherein said software program is configured to provide a synching function so that another computer may be selectively connected thereto and, under operator command, a data base in
5 said other computer containing reservation data may be uploaded to a data base in said software program containing a master data base of reservation data, said computer system comparing the data from said two data bases and choosing to store data from each according to a synch protocol at least
10 partially specified by the user.

88. The rental vehicle transaction system of claim 87 wherein said other computer is a mobile computer, and said selective connection is provided over an internet connection.

89. The rental vehicle transaction system of claim 83 wherein said software program is configured to permit the entry of user satisfaction data and transmit said user satisfaction data to an authority for response thereto.

90. The rental vehicle transaction system of claim 83 wherein said software program is configured to provide a menu of action items for selective entry and processing by a user thereof, and further comprising a command through which a user
5 may execute a plurality of entered action items all together without further operator action.

91. The rental vehicle transaction system of claim 83 wherein said software program has access to a data base in which data corresponding to an inventory of vehicles are kept, and wherein said software program is configured to permit a
5 user to access said data base to thereby view replacement vehicles available for transfer to a customer.

92. The rental vehicle transaction system of claim 91 wherein said software program is configured to permit

searching of said data base from parameters entered by said user.

93. The rental vehicle transaction system of claim 92 wherein said parameters include at least vehicle valuation.

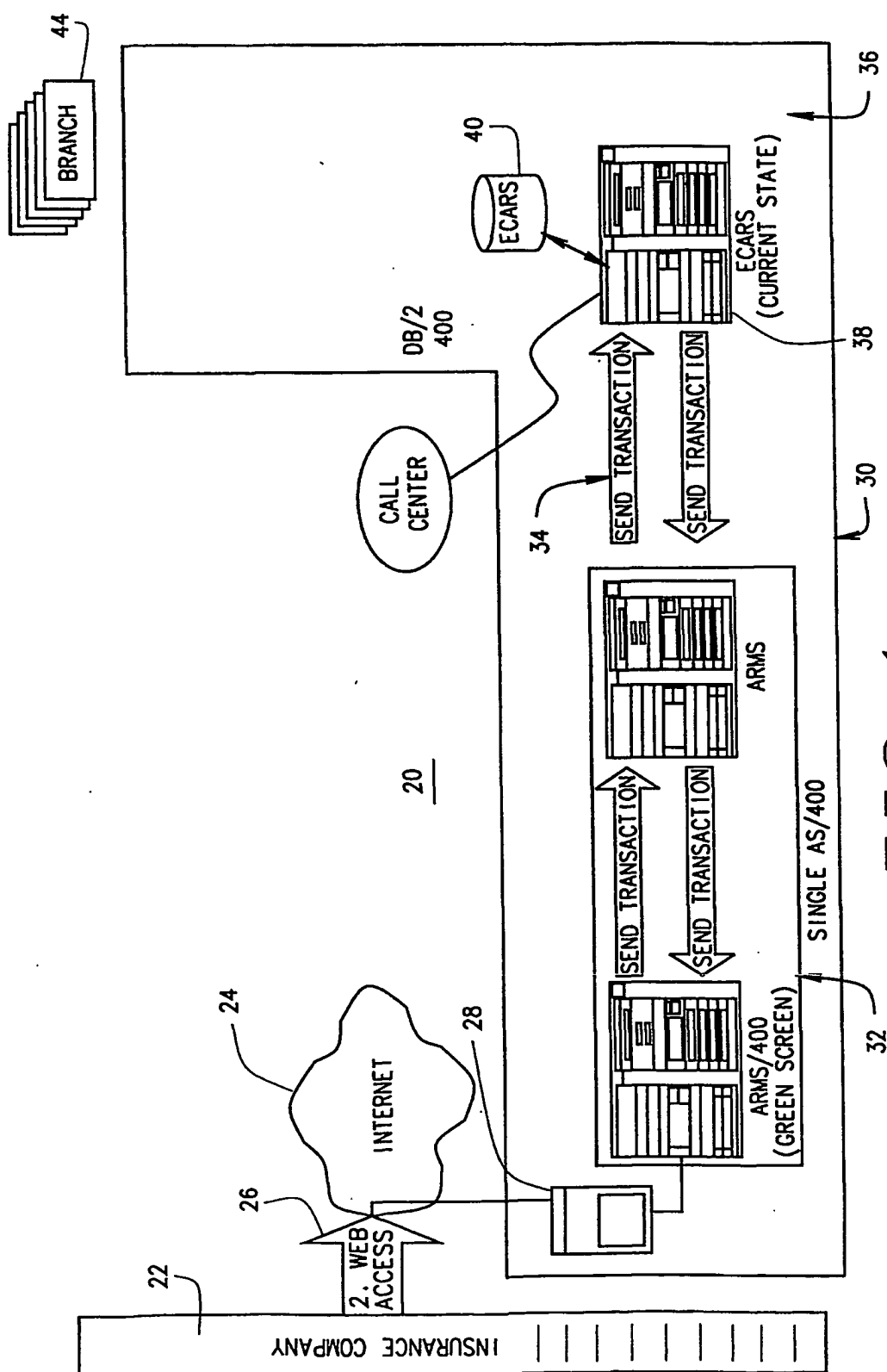
94. The rental vehicle transaction system of claim 93 wherein said software program is configured to accept authorization for said transfer by an insurance company.

95. The rental vehicle transaction system of claim 71 wherein said rental vehicle software program is configured to communicate over the Internet through a stateless connection.

96. The rental vehicle transaction system of claim 83 wherein said rental vehicle software program is configured to communicate over the Internet through a stateless connection.

97. An Internet enabled automatic rental vehicle transaction system, said system having an Internet web site through which an authorized purchaser of rental vehicle services may access a rental vehicle software program resident
5 on a computer system, said rental vehicle software program being configured to automatically respond to a series of commands from said authorized purchaser and communicate a rental vehicle reservation to at least one provider of said rental vehicle services, said at least one rental vehicle
10 service providers offering a plurality of specific geographically remote rental vehicle locations at which vehicles for rent are situated, said rental vehicle reservation having sufficient information for authorizing, processing and billing said rental vehicle transaction so that
15 a rental vehicle transaction may be automatically processed thereby for said at least one of said rental vehicle service provider, wherein said software program is configured to permit said authorized purchasers to modify said rental vehicle reservation through said Internet web site, wherein
20 said authorized purchaser comprises a business organization, said business organization having a plurality of authorized purchasers, said plurality of authorized purchasers being

enabled to access said Internet web site from any location
offering Internet web access, and wherein said at least one
25 rental vehicle service provider further comprises a second
business organization, said second business organization
having the computer system and rental vehicle software program
resident therein, and wherein said rental vehicle software
program is configured to communicate over the Internet through
30 a stateless connection.



THE

2/3

ARMS TRANSACTIONS

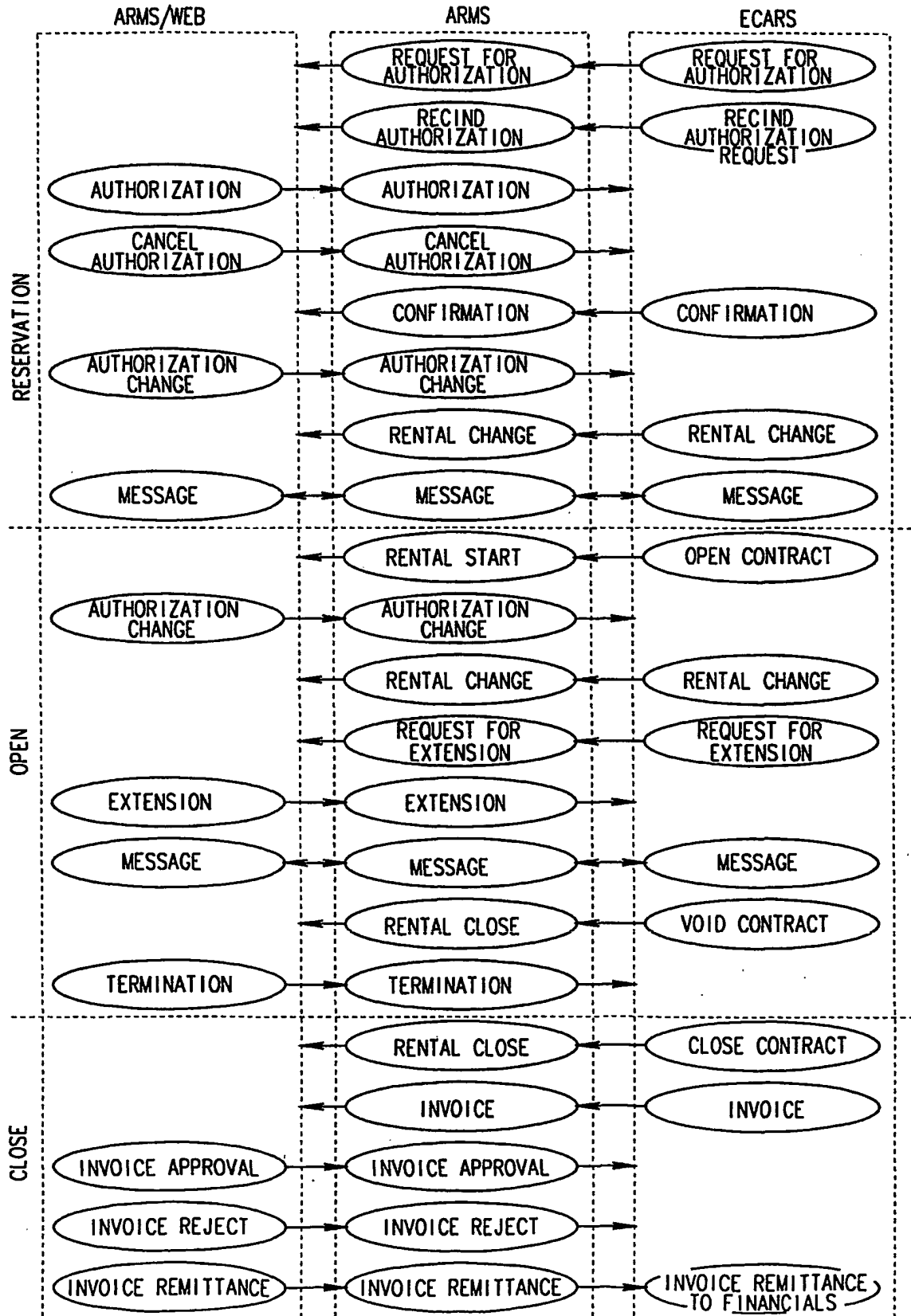


FIG. 2

3/3

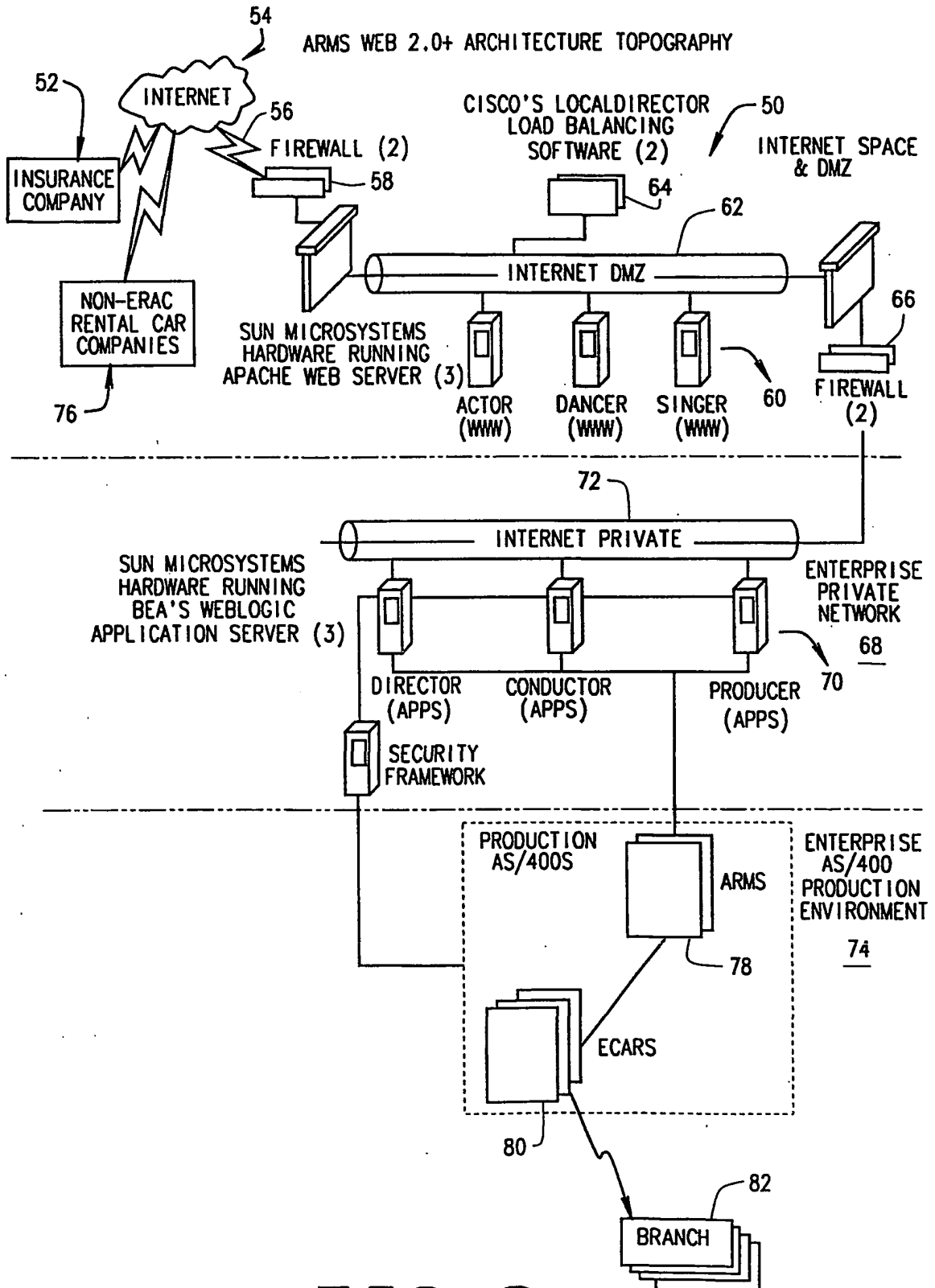


FIG. 3